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ABSTRACT

Subject indexing in ERIC is performed by subject specialists across 16 geographically dispersed ERIC Clearinghouses, each responsible for a different niche or aspect of educational information. This phenomenon, combined with the broadness of the education field and variability of terminology therein, has led to the development at the Clearinghouses of some unique indexing applications and patterns that are particularly suitable for retrieving their own particular subsets of the educational literature. However, Clearinghouse scope areas (areas of coverage) are not isolated entities, and any given scope area can overlap with others on any given document. Indexers handling documents with scope overlaps need to be aware and have access to the indexing practices of others outside their immediate field of expertise. This handbook was designed to satisfy these needs. It contains summaries of in-house, scope-specific indexing practices, Clearinghouse-by-Clearinghouse, prepared by the indexing supervisor(s) at each Clearinghouse. Routine updates are anticipated as Clearinghouses refine or expand their instructions for new indexers or as the system as a whole changes. The handbook also contains a summary of important ERIC indexing reminders, based on comments and discussions at ERIC technical meetings. The handbook recognizes that indexing and retrieval go hand-in-hand, and ERIC searchers will find the handbook useful when accessing subject areas that crisscross Clearinghouse scope areas. It also recognizes that indexing is not an isolated task in a database like ERIC. The assignment of Descriptors and Identifiers, for instance, is closely related to the decision-making process in assigning Publication Types

and Target Audiences, and guidelines are included in the handbook for these latter tasks, as well. This handbook supplements ERIC Processing Manual, Section 7--"Indexing" (IR 054 283). Other materials that should accompany usage of the handbook are the "ERIC Clearinghouse Scope of Interest Guide" (ERIC Processing Manual, Appendix A (IR 054 288)), the "Thesaurus of ERIC Descriptors," and the "ERIC Identifier Authority List (IAL)." (JH)

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ERIC

Processing Manual

Rules and Guidelines for the Acquisition, Selection, and Technical Processing of Documents and Journal Articles by the Various Components of the ERIC Network

Appendix C: ERIC Indexing Handbook (Clearinghouse Indexing Practices)

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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INDEXING HANDBOOK

(CLEARINGHOUSE INDEXING PRACTICES)

May 1989

(Revised -- June 1992)

Lynn Barnett & Jim Houston, Editors

ERIC Technical Steering Committee

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INDEXING: Why this handbook?

In a system like ERIC, it is sometimes difficult to know everything you need to know to operate as effectively as possible. Sometimes we just need a little extra information. This handbook is just that--extra information. It is designed to improve indexing and searching within the ERIC system. In no way is it intended to replace the *ERIC Processing Manual* (EPM), which contains detailed system rules for indexing. Neither does it contradict the EPM. Instead, this handbook recognizes that there are valid subject-area idiosyncracies that are not identified in the EPM or elsewhere; therefore it contains summaries of in-house, scope-specific indexing practices, Clearinghouse-by-Clearinghouse. It also contains a summary of important ERIC indexing reminders, based on comments and discussions at ERIC technical meetings.

This handbook recognizes that indexing and retrieval go hand-in-hand. Searchers should find it useful when searching subject areas that cross Clearinghouse scope areas.

It also recognizes that indexing is not an isolated task in a database like ERIC. For example, the assignment of Descriptors and Identifiers is closely related to the decision-making process in assigning Pubtype codes and Target Audiences. Regardless of which staff person is given the task (indexer, cataloger, supervisor) all three functions require an intellectual judgment about the nature of the document. Therefore this handbook includes guidelines for Pubtypes and Target Audience assignment as well as indexing guidelines.

The *ERIC Indexing Handbook* was prepared by and for ERIC staff, with input prepared by Clearinghouse indexing supervisors and compiled by the ERIC Technical Steering Committee. Routine updates are anticipated as Clearinghouses refine or expand their instructions for new indexers or as the system as a whole changes.

For further reference, see: *ERIC Processing Manual*; *ERIC Clearinghouse Scope of Interest Guide*; Introduction, published *Thesaurus of ERIC Descriptors* (Oryx Press).

May 1989

ERIC Technical Steering Committee
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Preface to the June 1992 Revision

This handbook was initially distributed at the May 1989 National Technical Meeting. At the time, the ERIC Technical Steering Committee planned to do a few minor corrections, then send the handbook to IR for Level-1 RIE processing. Somehow, this never got done. No one has said much about the product since 1989 and, until now, no action has been taken to put it into finished form. However, this is not to say that it was forgotten. From what I've seen and heard, ERIC indexers are using the product, and I have found it to be especially useful. For example, I have copied the *Indexing Reminders* section several times to use as a seminar/conference handout because it seems to illustrate more effectively than other available materials precisely what ERIC indexing is and how it really works. Nevertheless, questions have remained about getting the product into a more permanent form.

Since the original intent of the handbook was to supplement *Section VII "Indexing"* of the ERIC Processing Manual (EPM), the initial thinking was that maybe the two parts should be integrated. It soon became clear, however, that, in order to preserve the unique "pocket guide" character of the *Indexing Reminders* section and the helpful stand-alone qualities of the Clearinghouse sections, this should not be done. The fact that Clearinghouses prepared, and are individually responsible for, their own sections, made integration even more problematic.

The approach taken, therefore, was to attach the handbook essentially as is as an appendix of the EPM; the designation is EPM **Appendix C**. This preserves the integrity and usefulness of the original, permits continued maintenance and updating by the individual network components, and yet makes the handbook an integral part of the EPM (and its accompanying widespread circulation via EDRS or others).

I have made several changes to the *Indexing Reminders* section since the handbook was published in 1989. Textual changes are expressly marked with vertical lines. The Clearinghouse sections remain essentially the same as originally submitted (I did correct typos). It is hoped that Clearinghouses will provide the Facility with periodic updates to keep their individual sections complete and current.

June 1992

Jim Houston, Facility

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CH	Clearinghouse/Indexing Coordinators	Update
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EC	Handicapped and Gifted Children Judi Conrad	May 1989
FL	Languages and Linguistics Darla Domke	May 1989
HE	Higher Education Lynn Barnett	May 1989
IR	Information Resources Barbara Minor	May 1989
JC	Junior Colleges Anita Colby	May 1989
PS	Elementary and Early Childhood Education Norma Howard	May 1989
RC	Rural Education and Small Schools Linda Miller	May 1989
SE	Science, Mathematics, and Environmental Education Bob Howe	not submitted
SO	Social Studies/Social Science Education Jane Henson	May 1989
SP	Teacher Education Mary Tregillus	May 1989
TM	Tests, Measurement, and Evaluation Ruth Christie	May 1989 (preliminary)
UD	Urban Education Wendy Schwartz	May 1989

INDEXING REMINDERS

THE BASICS

Relevance to user

Put yourself in the position of the user or searcher. Can the specific topic(s) covered be retrieved by your assigned index terms? Would you, in fact, want the item(s) retrieved by your index terms (especially, your major terms)?

How many terms?

Remember that the scope and breadth of the document/article in hand determines the number of index terms (Descriptors and Identifiers) to be assigned. The system averages are 10 for CIJE and 12 for RIE.

Majors

Major index terms represent the principal subjects of a document/article. They are preceded by an asterisk.

Every document/article in the database must have at least 1 major Descriptor.

★*Remember the "5/2, 6/1 maximum" rule: No more than 5 major Descriptors and 2 major Identifiers, or 6 major Descriptors and 1 major Identifier, are allowed. Under no circumstances are there more than a total of 7 majors on a single document/article. At no time is the number of major Descriptors to exceed 6, even if no major Identifiers are used.*

Before concluding your indexing, count your major terms (asterisks) so that you don't use too many.

Minors

Minor index terms are used for certain types of concepts, e.g., population, educational level, methodology, document form. They may also be used to index substantive concepts that are important to the document, but less important than the concepts represented by major Descriptors.

Avoid using minor terms to index every concept mentioned in the document, however briefly. This gives users false expectations.

Thesaurus/IAL authority

Always use the most current, complete editions of the *Thesaurus* and *Identifier Authority List* (working copies from the ERIC Facility), plus all supplements.

- Follow definitions and instructions in scope notes.
- Follow format exactly. If a Descriptor has a parenthetical qualifier, be sure to include it in your indexing.

  Example: RETENTION (PSYCHOLOGY)

- Don't index solely from the Thesaurus Rotated Display.
- Refer to the Hierarchical Display for all narrower Descriptors.
- Use Identifiers to index concepts that cannot be captured by Descriptors alone.

Translate the author's language into Thesaurus terms. Watch out for "tricks" that lead to word indexing.

Example: "older workers" may not conform to ERIC's scope note for OLDER ADULTS.

Keep your Thesaurus and IAL in a single notebook so you can refer to both at once.

Scope notes

Read scope notes (SNs). Scope notes may define a term more broadly or restrictively than everyday usage might suggest. Make sure to use Descriptors compatible with the document's meaning. Don't force the use of a Descriptor just because it looks like it means the same thing.

Example: SELECTIVE ADMISSION does not mean admission of highly competitive ("selected") students, but admission due to a variety of particular circumstances.

Cross-clearinghouse subjects

For indexing cross-scope documents, see other Clearinghouses' "indexing rules" provided in this handbook. Also refer to the Descriptors frequently used by the other Clearinghouses, listed in the *ERIC Clearinghouse Scope of Interest Guide*. Use RIE and CIJE to see how other Clearinghouses have indexed the same concept.

Don't be hesitant to call a colleague at another Clearinghouse for advice, particularly when a cross-scope Descriptor lacks a scope note.

Broad Descriptors

Be wary of very broad Descriptors (e.g., CURRICULUM) whose use may cause irrelevant retrieval. Especially avoid majoring them, unless as an absolute last resort when nothing else will do. (See discussion and list of "Excessively Broad Terms" in EPM Section VII.I.5.b.(3).)

Indexing up

Index only to the level of specificity of the document. Never "index up" to a broader term (BT) if a more specific Descriptor (NT) exists.

Examples: Don't use DISABILITIES or VISUAL IMPAIRMENTS on a document about BLINDNESS.

Don't use HISTORY when EDUCATIONAL HISTORY is clearly more appropriate. (Note: This type of error occurs when one indexes from memory, or otherwise fails to observe the hierarchical structure of the Thesaurus.)

For analytics, it is likely that BTs will be appropriate for the parent document and NTs for the children.

Leveling Descriptors

As a rule, use one of the mandatory educational level Descriptors on every document. Very few documents don't need one.

★*Assign "educational level" first, before doing your other indexing.*

Consider using an age level Descriptor when educational level is inappropriate.

Overindexing

Don't overindex. Be especially wary of the number of Descriptors assigned to short articles. Also be careful of using (esp., majoring) too many Descriptors beginning with the same word.

Identifiers

Use the author's terminology to construct new Identifiers, but conform to ERIC structure. Follow precedents already listed in the IAL.

Jot down your Clearinghouse's new Identifiers in your copy of the IAL, or key them weekly to a cumulative list.

Remind yourself of Identifier-to-Descriptor graduations by routinely "redlining" such terms in your IAL.

Title check

Always look at the document's title before concluding your indexing, to see if you've missed any significant obvious topic(s).

Index terms versus terms in the abstract

Descriptors must be in the ERIC Thesaurus. Identifiers must either be in the IAL or, if new, reflect the style of similar terms in the IAL (e.g., organization names, court cases, etc.).

★*When writing an abstract, don't "translate" the author's language into Descriptor terminology.* The abstract is reserved for the author's own words (the actual language of the document). This gives the searcher more options for finding a concept, especially something new that hasn't evolved yet into "educationese."

LEVELING: **Mandatory Educational Level Descriptors**

Optional Age Level Descriptors

Assignment/specificity

★Nearly all ERIC documents/articles require an educational level Descriptor. Assign it first, before other indexing is done.

Use the most specific educational level. (See **chart on page 8** for hierarchy of mandatory Educational Levels.)

Education levelers are often easily extrapolated from a document's content without being specifically mentioned.

Examples: "Grade 8 students" certainly gives the educational level away.

Students "from X school district" is an educational level clue.

If there is no educational level, try to use an age level Descriptor (see **chart on page 9**); however, do not exclude more specific age-related Descriptors.

Example: document on childhood cancer would be indexed with age leveler CHILDREN (minor Descriptor), as well as *CHILD HEALTH and *CANCER (major Descriptors).

Avoid indexing the generic terms CHILDREN and ADULTS when appropriate narrower terms are available, e.g., ADOPTED CHILDREN, ADULT DROPOUTS.

Majoring

Leveling Descriptors should normally be minor. Major only if the levels themselves are the subject, e.g., history of preschool education, old old drivers.

Preschool and K-12 reminders

More than one educational level Descriptor may be required to cover some grade levels.

Example: INTERMEDIATE GRADES and/or JUNIOR HIGH SCHOOLS to cover middle school populations.

Note: MIDDLE SCHOOLS is not an educational level Descriptor and cannot be used as an educational level substitute. If a document discusses "middle schools" and indicates the grades covered (typically 5th through 8th), then INTERMEDIATE GRADES and/or JUNIOR HIGH SCHOOLS should be indexed, since they are the most specific education levelers available. However, if the document discusses GRADES 5 or 6 or 7 or 8, or all four, but does not mention the concept MIDDLE SCHOOLS, then MIDDLE SCHOOLS should not be indexed.

Use education levelers and population Descriptors together for research using student populations as subjects.

Example: ELEMENTARY EDUCATION and ELEMENTARY SCHOOL STUDENTS.

When the topic is day care, use EARLY CHILDHOOD EDUCATION as the education leveler, unless the day care population is described more precisely, such as preschool age children---use PRESCHOOL EDUCATION leveling term.

If specific grades are covered in any depth, use the grade Descriptors as well as the appropriate educational level Descriptor(s).

Example: GRADE 10, GRADE 11, and HIGH SCHOOLS.

Postsecondary reminders

Use HIGHER EDUCATION for bachelor-degree (or higher) programs; use POSTSECONDARY EDUCATION for other post-high school programs.

Use HIGHER EDUCATION for all documents covering both two- and four-year colleges. Use HIGHER EDUCATION also for all four-year colleges and universities.

Use TWO YEAR COLLEGES for documents covering junior or community colleges, two-year technical institutes, and two-year branch university campuses. Use TWO YEAR COLLEGES also for associate-degree programs.

For documents dealing with transfer from two-year to four-year colleges, use HIGHER EDUCATION. TWO YEAR COLLEGES (or TWO YEAR COLLEGE STUDENTS), COLLEGE TRANSFER STUDENTS, TRANSFER PROGRAMS, etc., should also be used, as appropriate.

Use POSTSECONDARY EDUCATION for documents that include discussions of technical institutes or proprietary schools as well as two- or four-year colleges.

Use POSTSECONDARY EDUCATION for post-grade 12 trade schools.

Watch non-U.S. documents carefully to determine whether HIGHER EDUCATION or POSTSECONDARY EDUCATION is the appropriate leveler. For example, a foreign "college" is often not the equivalent of a U.S. degree-granting college.

College ↔ School interplay reminders

When the subject is (Desc) COLLEGE SCHOOL COOPERATION, then two education levelers are needed.

Examples: TWO YEAR COLLEGES and ELEMENTARY EDUCATION;

HIGHER EDUCATION and HIGH SCHOOLS;

HIGHER EDUCATION and ELEMENTARY SECONDARY EDUCATION (where one or more colleges are cooperating with all levels of a school district).

If the subject is (Desc's) COLLEGE APPLICANTS, COLLEGE ADMISSION, or COLLEGE ENTRANCE EXAMINATIONS, i.e., the population is high school students taking SATs, ACTs, applying for freshman admittance, etc., then both HIGH SCHOOLS and either HIGHER EDUCATION (4-year institutions) or TWO YEAR COLLEGES should be used.

Teacher Education reminders

Teacher education (or student teaching) materials generally require both the level of teacher preparation and the level for which the student is being prepared to teach.

Examples: HIGHER EDUCATION and ELEMENTARY EDUCATION to describe preservice preparation for elementary school teachers, including their student teaching experience.

HIGHER EDUCATION and SECONDARY EDUCATION to describe college-level professional continuing education programs for secondary school teachers.

Teacher education materials should also be indexed to PRESERVICE TEACHER EDUCATION or INSERVICE TEACHER EDUCATION, if either is at all relevant. The first example above would carry PRESERVICE TEACHER EDUCATION -- the second, INSERVICE TEACHER EDUCATION. (The broad Descriptor TEACHER EDUCATION is used only for broad-ranging discussions or if further specificity is not provided.)

ERIC MANDATORY "EDUCATIONAL LEVEL" DESCRIPTORS

(Procedure implemented February 1975)

- **EARLY CHILDHOOD EDUCATION**
  Scope Note: Activities and/or experiences that are intended to effect developmental changes in children, from birth through the primary units of elementary school (grades K-3).

  - **PRESCHOOL EDUCATION**
    Scope Note: Activities and/or experiences that are intended to effect developmental changes in children, from birth to entrance in kindergarten (or grade 1 when kindergarten is not attended).

  - **PRIMARY EDUCATION**
    Scope Note: Education provided in kindergarten through grade 3.

- **ELEMENTARY SECONDARY EDUCATION**
  Scope Note: Formal education provided in kindergarten or grade 1 through grade 12.

  - **ELEMENTARY EDUCATION**
    Scope Note: Education provided in kindergarten or grade 1 through grade 6, 7, or 8.

    - **ADULT BASIC EDUCATION**
      Scope Note: Education provided for adults at the elementary level (through grade 8), usually with emphasis on communicative, computational, and social skills.

    - **PRIMARY EDUCATION**
      Scope Note: (See above.)

    - **INTERMEDIATE GRADES**
      Scope Note: Includes the middle and/or upper elementary grades, but usually 4, 5, and 6.

  - **SECONDARY EDUCATION**
    Scope Note: Education provided in grade 7, 8, or 9 through grade 12.

    - **JUNIOR HIGH SCHOOLS**
      Scope Note: Providing formal education in grades 7, 8, and 9 – less commonly 7 and 8, or 8 and 9.

    - **HIGH SCHOOLS** *(Changed from "Senior High Schools" in March 1980.)*
      Scope Note: Providing formal education in grades 9 or 10 through 12.

    - **HIGH SCHOOL EQUIVALENCY PROGRAMS**
      Scope Note: Adult educational activities concerned with the preparation for and the taking of tests which lead to a high school equivalency certificate, e.g., General Educational Development program.

- **POSTSECONDARY EDUCATION**
  Scope Note: All education beyond the secondary level – includes learning activities and experiences beyond the compulsory school attendance age, with the exception of adult basic education and high school equivalency programs. (Before APR75, restricted to "education beyond grade 12 and less than the baccalaureate level.")

  - **HIGHER EDUCATION**
    Scope Note: All education beyond the secondary level leading to a formal degree.

  - **TWO YEAR COLLEGES** *(Changed from "Junior Colleges" in March 1980.)*
    Scope Note: Public or private postsecondary institutions providing at least 2, but less than 4, years of academic and/or occupational education.

ERIC OPTIONAL "AGE LEVEL" DESCRIPTORS

NEONATES
Scope Note: Aged birth to approximately 1 month.

INFANTS
Scope Note: Aged birth to approximately 24 months.

YOUNG CHILDREN
Scope Note: Aged birth through approximately 8 years.

CHILDREN
Scope Note: Aged birth through approximately 12 years.

TODDLERS
Scope Note: Approximately 1-3 years of age.

PRESCHOOL CHILDREN
Scope Note: Approximately 2-5 years of age.

PREADOLESCENTS
Scope Note: Approximately 9-12 years of age.

ADOLESCENTS
Scope Note: Approximately 13-17 years of age.

YOUNG ADULTS
Scope Note: Approximately 18-30 years of age.

ADULTS
Scope Note: Approximately 18+ years of age.

ADULTS (30 TO 45)
Scope Note: Age group between "young adults" and "middle aged adults" --approximately 30-45.

MIDDLE AGED ADULTS
Scope Note: Approximately 45-64 years of age.

YOUNG OLD ADULTS
Scope Note: Approximately 65-75 years of age.

OLDER ADULTS
Scope Note: Approximately 65+ years of age.

OLD OLD ADULTS
Scope Note: Approximately 75+ years of age.

MAJORING

Purpose

Major index terms are used for pure subject content. Other content aspects (see "Things to avoid..." on next page) are assigned minor status. Major terms are identified by an asterisk (*Descriptor; *Identifier).

Only major terms are found in the printed subject indexes of RIE and CIJE.

Number

Each document/article must have at least 1 major Descriptor.

★*No more than a total of 7 majors are allowed, counting Identifiers. Remember the 6/1 or 5/2 rule (6 major Descriptors and 1 major Identifier are allowed, or 5 Descriptors and 2 Identifiers).*

Fewer majors are usually desirable for narrowly focused topics.

Always recount your majors (asterisks) to avoid using too many.

Summary

Major Descriptors should summarize the document/article.

Variety

Use variety. Be adventuresome! Avoid more than two major Descriptors beginning with the same word (important for manual searching).

Scope notes

Watch the Thesaurus scope notes for instructions. Some SNs say "Do not major unless subject of document."

Things to avoid majoring

Unless they are the subject of a document, avoid majoring:

- Very broad or general Descriptors (e.g., TEACHERS, MODELS, PROBLEMS) (Note: PROBLEMS should never be indexed, period)
- Educational level
- Age level
- Document form or type (e.g., LEADERS GUIDES, WORKBOOKS)
- Research methodology (e.g., COMPARATIVE ANALYSIS, GRADUATE SURVEYS)
- Population groups or research subjects
  - Ethnic groups (Note: Do not confuse the Descriptors ETHNIC GROUPS and MINORITY GROUPS -- see Thesaurus scope notes)
    - Race
    - Religion
    - Nationality
  - Personnel groups or occupation
  - Socioeconomic status
  - Intelligence or ability level
  - Physical/emotional characteristics
  - Sex (gender)

OVERINDEXING

Objective

Avoid overindexing (or underindexing). Index the document/article in hand. Don't make assumptions.

Consider only the most significant and essential concepts of a document/article.

Example: If a "sex" Descriptor (e.g., SEX DIFFERENCES) is used, it's usually not necessary to also index to MALES and FEMALES.

Minor Descriptors

Avoid peripheral topics. Restrict yourself to important ideas even when using minor Descriptors; too many can be confusing. Indexing everything in a document, even if only briefly mentioned, will give a user false expectations of the document content. Too many terms will also cause false drops or hits in searching.

Number of Descriptors

It doesn't hurt to keep the document's length in mind when judging the appropriate number of Descriptors to assign.

Resumes with more than 20 index terms (Descriptors/Identifiers) should be given a second look.

BTs/NTs

Use the most specific Descriptors available -- never automatically index "up" to a higher or broader level Descriptor unless the broader term is equally the subject of the document.

Example: Don't use LIBRARIES to index a document on PUBLIC LIBRARIES.

Sometimes, use of a BT together with several NTs is justified [ex: index to "fruit" (major) if the document is about apples, oranges, grapes, grapefruit, and kiwi (fruit), and also to each specific fruit name that is significantly covered].

Very broad Descriptors should be avoided where possible, especially as majors. (See discussion and list of "Excessively Broad Terms" in EPM Section VII.I.5.b.(3).)

Examples: CURRICULUM, EVALUATION, READING, CHILDREN, LANGUAGES.

Use Identifiers for additional/supplemental specificity, as appropriate.

Example:

- STEALING is the most specific available Descriptor for the Identifier SHOPLIFTING. If such an Identifier is majored, the corresponding Descriptor should usually be minored.

  DESC_STEALING
  IDEN_*SHOPLIFTING

Variant ethnic names may be indexed, provided they faithfully reflect the language of the document.

Examples:

- If African-Americans or Afro-Americans is used by an author, and this reflects the subject of a document, then AFRICAN AMERICANS or AFRO AMERICANS should be used as an Identifier supplemented by "Black" Descriptors, e.g.:

  DESC_Black Students; High Schools
  IDEN_African Americans

  If the words African-/Afro-Americans are not used by authors, neither should they be used by ERIC indexers/abstractors/catalogers to describe those authors' works.

- If Chicanos or Chicanas is used in the document, use CHICANOS or CHICANAS (or a derivative thereof) as an Identifier and a "Mexican American" Descriptor, e.g.:

  DESC_Mexican Americans; Females
  IDEN_Chicanas

  DESC_Mexican American Education
  IDEN_Chicano Arts; Chicano Studies

- Similarly, if an author prefers Native Americans to American Indians, then NATIVE AMERICANS (or a derivative) should be an Identifier supplemented by one or more "American Indian" Descriptors. (See the discussion focused on American Indian Identifiers in EPM Section VIII, Part 2.)

METHODOLOGY

Method

Assign methodology Descriptors if a substantial discussion of the method is included, but not if it is simply stated that a particular method is used.

Examples: CORRELATION, COHORT ANALYSIS, MULTIVARIATE ANALYSIS, COMPARATIVE ANALYSIS, TREND ANALYSIS, QUESTIONNAIRES

Questionnaires

Use the minor Descriptor QUESTIONNAIRES and the Pubtype code 160 on all documents that include the actual questionnaire. (See next section, PUBTYPE, for further information.)

Type of study

When indexing research documents, include a Descriptor (minor) describing the type of study.

Examples: CASE STUDIES, FIELD STUDIES, CROSS SECTIONAL STUDIES, ETHNOGRAPHY, LONGITUDINAL STUDIES, NATIONAL SURVEYS, STATE SURVEYS, SCHOOL SURVEYS, FOLLOWUP STUDIES.

If a document talks in detail about how to conduct these studies, major the Descriptor(s).

Surveys

Avoid use of the broad term SURVEYS when an appropriate NT is available, e.g., NATIONAL SURVEYS, STATE SURVEYS, GRADUATE SURVEYS.

"Research" Descriptors

"Research" Descriptors and Identifiers such as READING RESEARCH, COMMUNICATION RESEARCH, and LEGAL RESEARCH may be generally avoided in indexing (especially as majors), since the Publication Type usually captures the concepts (e.g., PUBTYPE_143), unless, of course, "Research" is the subject of the document. See next section for Pubtype reminders.

PUBTYPE

Cataloging data field

Publication/Document Type (PUBTYPE_) is a separate field from the Descriptor and Identifier fields in an ERIC document or journal article resume. See **chart on page 18** for all ERIC Publication Types and their codes.

How many?

Every document must have at least 1 Pubtype code assigned.

Up to 3 Pubtype codes may be assigned. (CIJE articles are given no more than 2 since Pubtype 080 is assigned automatically by the computer.)

Most documents can be described adequately with 1 or 2 Pubtype codes.

Cross-reference chart

Refer to the cross-reference chart (3 pages, beginning on **page 19**) if you are unsure about which Pubtype to assign.

"Empty containers"

Some Pubtypes are pure forms or "empty containers" (i.e., 010=books, 080=journal articles, 150=speeches/conference papers), and an additional more specific Pubtype may be appropriate.

Example: a journal article (080) may be also a state-of-the-art study (070).

"ERIC publications" (Pubtype 071), while not quite so "empty," is vague enough to warrant an additional Pubtype assignment in most instances.

Clarifying specificity

Pubtype codes on a document/article may be supplemented by Descriptors.

Use a specific Descriptor (usually minor) to clarify a Pubtype when appropriate.

Examples:

160 and QUESTIONNAIRES when the actual questionnaire/survey form is included.

160 and a "Tests" term [see MEASURES (INDIVIDUALS) hierarchy] when the actual test instrument is included.

143 and a "study" or "research" term (e.g., CASE STUDIES, FIELD STUDIES, LANGUAGE RESEARCH).

120 and POSITION PAPERS.

090 and HEARINGS and the appropriate Congress session Identifier (e.g., CONGRESS 102ND), on all texts of Congressional hearings.

090 and COURT LITIGATION (major) on summaries or guides about school law cases; also, 120 on review articles about those cases.

110 and 143, as well as appropriate "survey" and/or "statistics" Descriptors, for statistical surveys that include a narrative report.

GUIDES=050, 051, 052, or 055 (educational practitioner materials) and a minor Descriptor to describe the type of guide, e.g., GUIDELINES, LESSON PLANS, STATE CURRICULUM GUIDES, RESOURCE MATERIALS, UNITS OF STUDY, INSTRUCTIONAL MATERIALS, TEXTBOOKS, WORKBOOKS, FACULTY HANDBOOKS, LABORATORY MANUALS, STUDY GUIDES, TEST MANUALS.

"Exact match" Descriptors

Remember that you can't use certain Descriptors that exactly match a Pubtype name (e.g., BOOKS and 010), unless they reflect subject matter. Each carries the following note in the Thesaurus: "Corresponds to Pubtype xxx -- do not use except as the subject of a document."

See the **chart at the bottom of page 21** for exact match Descriptors and Pubtype codes.

Pubtype 120 – Viewpoints

Pubtype 120 often serves as a catch-all. Be sure it's the most appropriate code to use.

Pubtype 140 group – Reports

Pubtypes 141, 142, and 143 should usually (but not always) be used independently of each other.

CODE*	PUBLICATION/DOCUMENT TYPES
010	BOOKS
	COLLECTED WORKS
020	—General
021	—Conference Proceedings
022	—Serials
030	CREATIVE WORKS (Literature, Drama, Fine Arts)
	DISSERTATIONS/THESES
040	—Undetermined
041	—Doctoral Dissertations
042	—Masters Theses
043	—Practicum Papers
	GUIDES
050	—General (use more specific code, if possible)
	—Classroom Use
051	—Instructional Materials (For Learner)
052	—Teaching Guides (For Teacher)
055	—Non-Classroom Use (For Administrative and Support Staff, and for Teachers, Parents, Clergy, Researchers, Counselors, etc., in Non-Classroom Situations)
060	HISTORICAL MATERIALS
070	INFORMATION ANALYSES (State-of-the-Art Papers, Research Summaries, Reviews of Literature on a Topic)
071	—ERIC Information Analysis Products (IAPs)
072	—Book/Product Reviews
073	—ERIC Digests (Selected) in Full Text
080	JOURNAL ARTICLES
090	LEGAL/LEGISLATIVE/REGULATORY MATERIALS
100	AUDIOVISUAL/NONPRINT MATERIALS
101	—Computer Programs
102	—Machine-Readable Data Files (MRDFs)
110	STATISTICAL DATA (Numerical, Quantitative, etc.)
120	VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.)
	REFERENCE MATERIALS
130	—General (use more specific code, if possible)
131	—Bibliographies/Annotated Bibliographies
132	—Directories/Catalogs
133	—Geographic Materials/Maps
134	—Vocabularies/Classifications/Dictionaries
	REPORTS
140	—General (use more specific code, if possible)
141	—Descriptive (i.e., Project Descriptions)
142	—Evaluative/Feasibility
143	—Research/Technical
150	SPEECHES, CONFERENCE PAPERS
160	TESTS, EVALUATION INSTRUMENTS
170	TRANSLATIONS
171	—Multilingual/Bilingual Materials

*Up to 3 codes for RIE, or 2 for CIJE, can be assigned to each document.

GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Abstracts	131
Administrator Guides	055
Annotated Bibliographies	131
Annual Reports	141
Answer Keys	160
Answer Sheets	160
Anthologies	020
[Archival Documents]	060
Atlases	133
Audiodisks	100
Audiotape Recordings	100
★Audiovisual Aids	100
Autobiographies	060
★Bibliographies	131
[Bilingual Materials]	171
Biographical Inventories	060 (132)
Biographies	060
[Booklists]	131
★Books	010
Book Reviews	072
Bulletins	022
[Bylaws]	090
Cartoons	100 (030)
Case Records [or] Case Studies	141 or 143 or 140
Catalogs	132
Charts	100
Check Lists	130 or 160
[Childrens Books]	010 and 030
Childrens Literature	030 (010)
Chronicles	060 (020)
Citation Indexes	131
[Class Newspapers]	022
[Classroom Games]	051 (100)
[Classroom Materials]	051 or 052
Codes of Ethics	090
Comics (Publications)	030
Computer Output Microfilm	100
★Computer Software	101
Computer Software Reviews	072 (142)
[Concordances]	134
★Conference Papers	150
★Conference Proceedings	021

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
[Conference Summaries]	021
Contracts	090
Course Descriptions	052 or 050 or 051
[Courtroom Transcripts]	090
[Creative Works]	030
Curriculum Guides	052 or 050 or 051
[Data Sheets]	110 or 130
Databases	102
Diagrams	100
Diaries	120 (060 or 030)
★Dictionaries	134
[Dictionary Catalogs]	131
★Directories	132
[Discipline Codes]	090
Discographies	131
★Doctoral Dissertations	041
Documentaries	100 (141)
Drama	030
Editorials	120
Encyclopedias	130
[ERIC Digests in Full Text]	073
[ERIC IAPs]	071
Essays	120 or 030
[Evaluation Studies]	142
Facility Guidelines	055
Faculty Handbooks	055
Feasibility Studies	142
Filmographies	131
Films	100
Filmstrips	100
Flow Charts	100
Foreign Language Books	010 (170)
Foreign Language Films	100 (170)
Foreign Language Periodicals	022 (170)
Games	030 or 100
Glossaries	134
Graphs	100
Guidelines	050 or 052 or 055
★Guides	050 or 051 or 052 or 055

FOOTNOTES:

1. All terms not in brackets have been selected from the ERIC Thesaurus.
2. Conventions
   - A or B = one or the other category is appropriate, depending on item.
   - A and B = two categories are appropriate.
   - A (B) = a second category might be appropriate, depending on item.
   - ★ = category and term are synonymous. Term should be used in Descriptor field only when it denotes subject matter.
3. These terms, like all other Descriptors identifying the form or type of a document, should be used as major Descriptors only when they represent the subject of the document in hand.

[Bracketed terms are not Descriptors]

BEST COPY AVAILABLE

GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Hearings	090
[Historical Reviews]	060
Illustrations	100
Indexes	130 or 131
[Information Analyses]	070 or 071
Instructional Materials	051
Interviews	120 or 160
Item Banks	160
[Journal Articles]	080
[Journals]	022
[Judicial Materials]	090
Kinescope Recordings	100
Laboratory Manuals	051
[Language Guides]	051 or 030 (170)
Large Type Materials	051
Leaders Guides	052
[Lecture]	150 (051)
[Legal Analysis]	090
Legislation	090
Lesson Plans	052
Letters (Correspondence)	030
[Literature Guides]	131
Literature Reviews	131 (070)
[Lobbying Papers]	090 and 120
Magnetic Tape Cassettes	100
Magnetic Tapes	100
[Manuals]	050 or 051 or 052 or 055
Maps	133
Master Plans	090
[Master Tapes (Audio)]	100
★Masters Theses	042
Matrices	100
Microforms	100
Models	100 or 143
★Multilingual Materials	171
[Musical Materials]	030
Negotiation Agreements	090
Newsletters	022
Newspapers	022
Nonprint Media	100
Opinions	120
[Oral History Transcripts]	060

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Pamphlets	Document Dependent
[Parent Guides]	055
Patents	090
Periodicals	022
Permuted Indexes	130 or 131
Personal Narratives	060 or 120
[Phonograph Records]	100
Photographs	100
Poetry	030
Position Papers	120
★Practicum Papers	043
Program Descriptions	141
Program Evaluation	142
Program Guides	141
Program Proposals	141
[Programed Texts]	010 and 051
Puzzles	030 or 100
Questionnaires	160
Rating Scales	160
[Recommendations]	120
Records (Forms)	Document Dependent
★Reference Materials	130 (010)
[Regulations]	090
★Reports	140
[Research Methodology Guides]	055
Research Proposals	143
★Research Reports	143
[Research Reviews (Publications)]	070
Resource Materials	050 or 051 or 052 or 055
Scholarly Journals	022
School Newspapers	022
School Publications	Document Dependent
Scripts	030
★Serials	022
Short Stories	030
Slides	100
Specifications	090
★Speeches	150
Standards	090
State of the Art Reviews	070
★Statistical Data	110
Student Journals	120 (030)
Student Publications	Document Dependent
Study Guides	051

Page 2 of 3
(see explanatory footnotes on first page)

[Bracketed terms are not Descriptors]

GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Surveys	160 or 143
Tables (Data)	110
Talking Books	100
Tape Recordings	100
[Taxonomy]	134
Teaching Guides	052
[Technical Reports]	143
Test Reviews	072 (142)
★Tests	160
Textbooks	010 and 051
Thesauri	134
★Theses	040
[Transcripts (Interview)]	120
[Transcripts (Legal)]	090
[Transcripts (Oral History)]	060
Videodisks	100
Videotape Recordings	100
★Vocabulary	134
Word Lists	134
Workbooks	051
Worksheets	051
Yearbooks	141 (022)

Page 3 of 3
(see explanatory footnotes on first page)

[Bracketed terms are not Descriptors]

DESCRIPTORS CORRESPONDING TO PUBLICATION TYPE CATEGORIES

DESCRIPTOR	PUBTYPE CODE
AUDIOVISUAL AIDS	100
BIBLIOGRAPHIES	131
BOOKS	010
COMPUTER SOFTWARE	101
CONFERENCE PAPERS	150
CONFERENCE PROCEEDINGS	021
DICTIONARIES	134
DIRECTORIES	132
DOCTORAL DISSERTATIONS	041
GUIDES	050
MASTERS THESES	042
MULTILINGUAL MATERIALS	171
PRACTICUM PAPERS	043
REFERENCE MATERIALS	130
REPORTS	140
RESEARCH REPORTS	143
SERIALS	022
SPEECHES	150
STATISTICAL DATA	110
TESTS	160
THESES	040
VOCABULARY	134

TARGET AUDIENCE

Cataloging data field

Target Audience (AUD_), like PUBTYPE, is a separate field from the Descriptor and Identifier fields. See **chart on page 24** for ERIC's list of defined and permissible Target Audiences.

Number

Not every document is assigned a Target Audience. The system average is around 25%.

As many Target Audience designations as needed can be assigned to a single document, provided that the designated audience names and an overall space limitation of 80 characters are adhered to.

Assignment

Use Target Audience only if the document or article explicitly directs itself to an audience, e.g., "...intended for school teachers..." ★Don't guess who might want a document.

Assume that Target Audience implies restrictiveness, that its assignment excludes the document's relevance to other groups.

Journals

Don't automatically assign a particular Target Audience to all items from a given journal. Even if the journal is published by a research society, teacher association, administrator organization, etc., each article should be judged independently for Target Audience. Use of the Target Audience field is appropriate only if an article specifically mentions a particular audience. Otherwise, the field should be left blank.

Practitioners

Remember that "AUD_Practitioners" will be assigned automatically by the ERIC computer when any of the narrower practitioner sub-category terms (e.g., Teachers) are assigned. This is different from the way ERIC Descriptors work.

Researchers

"AUD_Researchers" should be used circumspectly; its use can be generally restricted to documents/articles that are so esoteric (technical) that they would be of little interest to other audiences.

TARGET AUDIENCE

Educational documents and journal articles are sometimes written for particular audiences. ERIC currently identifies these audiences in a special "Target Audience" field (data element). The field is used when an author clearly specifies an intended audience; otherwise, it is left blank. For consistency, eleven (11) distinct audiences have been defined by ERIC, as follows:

- **Policymakers**
- **Researchers**
- **Practitioners***
  - **Administrators**
  - **Teachers**
  - **Counselors**
  - **Media Staff**
  - **Support Staff**
- **Students**
- **Parents**
- **Community**

**Note: The ERIC computer system automatically adds the generic audience "Practitioners" to records cataloged by any of the five "practitioner" sub-categories.*

IDENTIFIERS

Most important rules

1. **IAL.** Use the *Identifier Authority List*! Try every possible way to correlate a new concept with already existing terms.

2. **UFs.** Don't use Thesaurus UFs as Identifiers.

3. **Majors.** Maximum of 2 major Identifiers (with up to 5 major Descriptors), or only 1 if the maximum 6 major Descriptors are used.

4. **Format.**

   Use IAL precedents rather than creating or inventing unnecessary new Identifiers.

   When creating necessary new Identifiers, follow the IAL format for similar terms. Use the IAL Category Display to find parallel terms.

   Remember the 50-character limit (including spaces).

   No punctuation is allowed except left and right parentheses, not even apostrophes. Examples:

   ADAMS V RICHARDSON
   AMERICAS COMPETITIVE CHALLENGE
   BENNETT (WILLIAM J)

5. **Acronyms.** Acronyms are not allowed as a rule. Some exceptions: ERIC, UNESCO, USSR.

Potential Identifiers

★*Don't be reluctant to use Identifiers!* Always index the following when they are the subjects of documents/articles:

- Institution or association names (don't index them if they merely prepared the report, unless it is an official position paper or similar statement of the institution)
- School district names (use in lieu of public school names, unless the latter are particularly significant)
- College or university names

- Languages not in the Thesaurus
- Tribes
- Persons
- Laws (enacted, not proposed)
- Geographic regions
- Foreign country names (coordinated with the minor Descriptor FOREIGN COUNTRIES -- watch out for ERIC's idiosyncrasies for Canada and the U.K.)
- Test names
- Computers/computer programs
- Specific methods, theories, ideas, etc., not in the Thesaurus
- New terms in the discipline or field not yet in the Thesaurus

Country names

Use DESC_FOREIGN COUNTRIES (minor) and IDEN_name of the country (major or minor, followed by city or other geopolitical subdivision, if appropriate, in parentheses).

Refer to IAL for proper format.

Example: NORTH KOREA or SOUTH KOREA, not KOREA

Use IDEN_UNITED STATES sparingly, usually for various subdivisions, e.g., UNITED STATES (SOUTH), or for overall comparisons with other countries. Otherwise, it is implied by its absence.

Identifiers for Canada and the U.K. name the province or state, e.g., ALBERTA (EDMONTON), ENGLAND (LONDON). Don't index CANADA or UNITED KINGDOM alone unless you really mean the entire country. Don't index GREAT BRITAIN unless you mean England, Scotland, and Wales, but not Northern Ireland.

Don't use AFRICA (continent) in lieu of more specific African countries.

Geographic attribution

Organization names are generally followed by U.S. state or Canadian province postal abbreviations, or by other country names in parentheses.

Examples: AMERICAN UNIVERSITY OF BEIRUT (LEBANON)
HARVARD UNIVERSITY MA
UNIVERSITY OF VICTORIA BC

Note the Canadian abbreviations:

Alberta	AB
British Columbia	BC
Labrador	LB
Manitoba	MB
New Brunswick	NB
Newfoundland	NF
Northwest Territories	NT
Nova Scotia	NS
Ontario	ON
Prince Edward Island	PE
Quebec	PQ
Saskatchewan	SK
Yukon Territory	YT

United Kingdom organizations are followed by one of the four principal divisions, if appropriate, i.e., (ENGLAND), (SCOTLAND), (WALES), (NORTHERN IRELAND).

Avoid guesswork in selecting organizational geographic locations. While the locations of organizations/institutions are often not specifically stated, adequate clues usually exist in the document. All locations should be verified in one of the standard reference sources cited in EPM Section VIII, Part 2 (Category #17 discussion). If a location proposed by the indexer does not agree with that in the standard reference, it probably means that the proposed location is incorrect.

School System? or City?

If the focus of a document is on a particular public school system, use the school district name as an identifier.

Example: NEW YORK CITY BOARD OF EDUCATION

If the focus is more on the school system's general locale, use the location itself as the identifier.

Example: NEW YORK (NEW YORK)

Such Identifiers are majored when crucial to the content of the document.

Note: Names of specific public grade schools or high schools should not be indexed unless they're particularly outstanding; instead, index the school district's name.

Coordinate with Descriptors

To index a specific concept, both a Descriptor and an Identifier may be needed.

Example: DESC_GAMES (minor) and IDEN_*CARD GAMES

Collections of documents

Sometimes unique Identifiers are assigned to a collection of documents important to retrieve as a group.

Examples: AAUP CONTRACTS (major) – for collective bargaining contracts collected for ERIC by the American Association of University Professors

NATIONAL DIFFUSION NETWORK PROGRAMS (minor) – for descriptions of programs sponsored by NDN

Legislation

Use PROPOSED LEGISLATION for legislation that hasn't passed yet.

Use name and date for legislation that has passed.

Example: MISSING CHILDREN ACT 1982

Use public law numbers only as a last resort. The name is preferable.

Example: PUBLIC LAW 87 276

Include the number of the Congressional session on documents like House and Senate hearings.

Example: CONGRESS 102ND

MISCELLANEOUS

ERIC Digests

All ERIC Digests are indexed by the minor Descriptor "ERIC Digests" (and assigned Pubtype 071).

Foreign countries

Use FOREIGN COUNTRIES (Descriptor, minor) and the country name (Identifier, probably major) for documents about countries other than the U.S.

Qualify country names by parenthetical geographic subdivision if appropriate, e.g., MEXICO (MONTERREY). It is usually more appropriate to cover smaller, lesser-known geographic subdivisions in the abstract.

When a document is about DEVELOPING NATIONS (and/or, when non-U.S., DEVELOPED NATIONS), and uses this or synonymous terminology (e.g., "underdeveloped countries," "third world"), index with these Descriptors in addition to FOREIGN COUNTRIES.

The Descriptor FOREIGN COUNTRIES may be majored when it is the broad subject or when more than 2 country names are subject-indexed (i.e., more than the maximum 2 major Identifiers).

Public vs. private education

Assign "public" or "private" Descriptors (e.g., PUBLIC EDUCATION, PUBLIC SCHOOLS, PUBLIC COLLEGES, PRIVATE EDUCATION, PRIVATE SCHOOLS, PRIVATE COLLEGES) on appropriate documents. Don't assume that it is obvious to the user.

Languages

When indexing a language name, check first to see if it is a Thesaurus Descriptor, i.e., in the LANGUAGES hierarchy. Then, look under IAL category #13.

For new "language" Identifiers, call FL for advice, or use the following authorities:

Classification and Index of the World's Languages
by C.F. and F.M. Voegelin (Elsevier, 1977).

Ethnologue (10th edition), by Wycliffe Bible Translators (1984).

Documents on specific modern languages other than English, French, German, Spanish, Italian, and Russian, are indexed with the Descriptor UNCOMMONLY TAUGHT LANGUAGES along with the specific language name(s).

Language vs. people

Distinguish between the name of a language and its speakers, and between speakers of a language and their geographic location.

Examples: DESC_JAPANESE refers to the language
DESC_JAPANESE AMERICANS refers to Americans of Japanese origin
IDEN_JAPANESE PEOPLE is self-evident.

Foreign language speakers

If a document discusses speakers of languages other than English, use:

-- (Desc) SPANISH SPEAKING, (Iden) FRENCH SPEAKING, etc.,

OR

-- the specific language name itself (Desc or Iden -- whichever way it is in the Thesaurus or IAL),

OR

-- if the language is unspecified, (Desc) NON ENGLISH SPEAKING.

Of course, (Desc) ENGLISH, (Iden) ENGLISH SPEAKING, etc., are also indexed when they are the subjects of documents.

The concept of "non-English speakers enrolled in classes for the purpose of acquiring English" should be indexed by the Descriptor ENGLISH (SECOND LANGUAGE) in combination with SPANISH SPEAKING, NON ENGLISH SPEAKING, etc.

The Descriptor LIMITED ENGLISH SPEAKING should be used when that population is specifically discussed. Note that "Non English" and "Limited English" are different populations and should be so distinguished in indexing practice.

"Bilingual" population terms (i.e., BILINGUAL STUDENTS, BILINGUAL TEACHERS, BILINGUAL TEACHER AIDES) refer to those who know more than one language, not to those acquiring a second language through BILINGUAL EDUCATION or BILINGUAL EDUCATION PROGRAMS.

Foreign language documents

In the vast majority of foreign language documents, the language is not the subject but merely the vehicle of communication (e.g., a guide in Japanese on job safety). Therefore, do not use Descriptors in these cases to denote the language, but use the Language (LANG_) field.

In those rare cases where a foreign language document also has the language as its subject, appropriate language Descriptors may be used.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
ADULT, CAREER, AND VOCATIONAL EDUCATION

Prepared by

Sandra Kerka

May 1989
(check list only)

ERIC

Clearinghouse on Adult, Career,
and Vocational Education

1900 Kenny Road
Columbus, Ohio 43210-1090

Phone: (614) 292-4353 (OH, HI, AK)
(800) 848-4815

INDEXING CHECKLIST

1. Are all concepts in the title and/or abstract represented in the Descriptors (or Identifiers)?

2. Are Descriptors being used in accordance with their Scope Notes and Term Displays?

3. Is a mandatory educational level term assigned if appropriate? (See list on pages v-vi of Thesaurus Working Copy.) Is it the most specific level term for the document? (USUALLY SHOULD NOT BE MAJORED!)

4. Do the majored terms represent the emphasis of the document?

5. Are all appropriate concepts included in the indexing, including those outside the scope of this Clearinghouse?

6. Has the "Rule of 7" been followed: maximum of 6 major Descriptors (and 1 major Identifier, if used); maximum of 5 major Descriptors if 2 Identifiers are majored.

7. Do the Descriptors assigned conform with the Thesaurus as to spelling, format, etc.? NOTE: although the Working Copy lists everything in upper case, only the first letter of each word in a Descriptor should be capitalized--except phrases such as Futures (of Society); Trade and Industrial Education.

8. Descriptors corresponding exactly to Pubtype Codes should be assigned only if the subject of the document. (This rule applies to minor as well as major use. See list on page viii of Working Copy.)

9. Have NTs been posted along with BTs from the same hierarchy? If so, are both levels truly appropriate? That is, does the indexing match the level of specificity of the document?

10. Are very broad, top-of-the-hierarchy terms being used? (See page 45, Section 7, Processing Manual.) Are other, more specific terms more appropriate?

11. If foreign countries are discussed, is the Descriptor Foreign Countries assigned?

12. Is the format of Identifiers as it appears in the Identifier Authority List? (See Processing Manual, Section 8, part 2, when creating new Identifiers.)

13. Identifiers should have no punctuation. There is a 50-character limit.

14. Are the Identifiers in alphabetical order?

15. For Congressional documents, is the appropriate Identifier assigned (e.g., Congress 98th, Congress 100th)?

16. For ERIC Digests, is the Identifier ERIC Digests assigned (and the pubtype 071)?

INDEXING PRACTICES

OF THE

ERIC CLEARINGHOUSE

ON

COUNSELING AND PERSONNEL SERVICES

Prepared by

Nancy Beekman

May 1989

Counseling and Personnel Services Clearinghouse

2108 School of Education, The University of Michigan
Ann Arbor, Michigan 48109-1259 (313) 764-9492

INDEXING RULES - CG
General Rules

1. Number of Index Terms

12 for RIE and 10 for CIJE (average)*
6 major descriptors and major identifier, or 5 major descriptors and 2 major identifiers (maximum)*
Assign at least 1 major descriptor to every document
Avoid using - or majoring - too many descriptors beginning with the same word (e.g.,"counseling)

*Don't try too hard to keep these numbers. Some documents don't require many index terms. Better to keep numbers low than to put in unimportant terms.

2. Major/minor

Normally we do not major:
- Educational Level (assigned first, before any other indexing is done)
- Age Level
- Document Type
- Research Methodology
- Subjects or population
- Very broad or general descriptors

3. Population Terms

Index by specific groups: Battered Women, Gifted, Employed Women
Ethnic Groups/Nationalities/Socioeconomic Status/Intelligence or Ability Level
Personnel Groups/Physical or Emotional Characteristics/Sex
Age Level - age levels should be used as in ERIC categories - not necessarily author categories

4. Educational Levels

Always use educational levels and population descriptors together for research using student populations as subjects, e.g.: Higher Education and College Students; Higher Education and Undergraduate Students.
Always use most specific educational level possible - paying attention to grade level of population
Always include all grades of subjects - may be necessary to use more than one educational level descriptor (e.g., use of Intermediate Grades and /or Junior High Schools to describe middle school populations)

5. Miscellaneous

Always use Foreign Countries as a minor descriptor for documents/articles about countries (populations included) other than the U.S.A., coordinating the name (s) of the specific country/countries (and geographic sub-divisions) in the Identifier field. Geographic identifiers may be major or minor as appropriate.

ERIC®

Garry R. Walz, Director

Counseling and Personnel Services Clearinghouse

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Ann Arbor, Michigan 48109-1259 (313) 764-9492

Scope Area Rules

Use most specific counseling term (s), e.g. adult, career, educational, family, individual, marriage, nondirective, parent, peer, rehabilitation, school. See counseling hierarchy.

Always use most specific descriptor to identify educational level, population, etc., without omitting any of the subjects. Use identifiers for additional/supplemental specificity, as appropriate. Not necessary nor desirable to also index Males and Females when indexing Sex Differences.

Always pay close attention to restrictions delineated in Scope Notes.

Types of Research: Use minor descriptors such as case studies, comparative analysis, trend analysis, longitudinal studies, followup studies, national surveys, or state surveys when appropriate to facilitate retreival. National Surveys, Trand Analysis, and Longitudinal Studies are especially helpful in searching. Use Questionnaires (as a minor) and pubtype 160 on documents that include the actual survey instrument.

**Do not think you can automatically index by terms used by authors. Take the time to read scope notes to determine whether the author's terminology is appropriate for indexing. Some examples:

Anglo Americans - authors often use term to mean whites or white students.
Age Levels -"Older adults" sometimes doesn't mean Older Adults in ERIC's sense (one recent article used the term for those over 40).

IDENTIFIERS:

Don't be reluctant to use identifiers

Always index the following types of identifiers when they're the subjects of documents (use the IAL precedents):

Institution or association names (don't index them if they merely prepare a report, unless it is an official position paper or similar statement);
College or university names;
Persons;
Laws (enacted, not proposed);
Geographic Regions;
Foreign country names (be sure to note ERIC's idiosyncrasies for Canada and the U.K.);
Test names;
Computers and computer programs;
Specific theories, forms of counseling/therapy. ect., not found the Thesaurus;
New terms in the field, especially those being written about frequently. In our case,such terms include Bereavement, Osteoporosis, Access to Health Care, Acquaintance Rape, Child Protection, Informed Consent, Discharge Planning, Computer Assisted Counseling, School Based Health Clinics

ERIC

Garry R. Walz, Director

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
READING AND COMMUNICATION SKILLS

Prepared by

Nola Kortner Alex

May 1989

ERIC
CLEARINGHOUSE ON READING AND COMMUNICATION SKILLS
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CS In-House Indexing Procedures

1. Major and Minor Terms

a. Index concepts or terms (descriptors and identifiers) must reflect the language and precedents of the ERIC Vocabulary, i.e., the ERIC Thesaurus and IAL.

b. CS averages 10-11 descriptors and identifiers per document. It depends very much on how narrow the focus of the document is.

c. Maximum majors permitted are: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.

d. Every citation must have at least 1 major descriptor, and no more than 2 major identifiers. Fewer majors are usually desirable for narrowly focused topics.

e. Index to the most specific term; never index up to broader terms unless they're equally the subjects of documents.

f. Index the document/article in hand -- don't make assumptions.

g. The amount of indexing should reflect the size and depth of the document/article, e.g., a large document should almost certainly have more index terms than a five page journal article.

h. Avoid overindexing and underindexing (see "overindexing," item 8," below) -- consider only the significant and essential concepts of the document.

i. Too many minor descriptors are confusing; use the most important ideas. Accumulations of more than 20 terms per document should be given a second look.

j. Be careful not to overload with more than two major descriptors beginning with the same word (important for manual searching).

k. Always look at the document's title before concluding your indexing, to see if you've missed any significant topic(s).

1. Try to assume the searcher's point of view. Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

2. Population Terms

a. Use descriptors to refer to the groups or individuals studied or discussed in a document. These are normally not majored unless they're the subject or an important aspect of the document.

b. Types of terms that describe population include:

Educational level
(must be assigned if the document deals with it--see item 3, below);
Age level;
Ethnic group
(race, religion, nationality);
Intelligence or ability level;
Physical/emotional characteristics;
Socioeconomic characteristics;
Sex.

3. Educational Level Descriptors

a. Must be indexed if dealt with in a document.

b. Indexers should acquire the habit of assigning education levelers first, before any other indexing is done.

c. Always use the most specific educational level possible.
EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

d. Minor when they describe the level at which something, i.e., the document subject, occurs (the usual case).
EX -- A report on literacy among high school seniors.

e. Major only when the levels themselves are the subject.
EX -- Philosophy of, theory of, history of, important legislation concerning.

f. Use specific grade descriptors, e.g., Grade 7, Grade 2, in addition to educational level descriptors. However, avoid indexing grade ranges (e.g., Grade 7, Grade 8, and Grade 9) when they're essentially equivalent to a

level (i.e., Grades 7, 8, & 9 = Junior High Schools).

g. If appropriate, more than one level may be assigned.
EX -- Intermediate Grades and/or Junior High Schools to describe middle school populations; Higher Education and Elementary Education to describe preservice preparation for elementary school teachers.

h. If there is no educational level, try to use an age level.

i. See lists of educational level descriptors and age level descriptors in Thesaurus front matter and in the Indexing Handbook.

4. Form Descriptors

a. When indexing research documents (unless there is an exact overlap with Pubtype codes), care is taken to include a descriptor (minor) describing the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies. If a document talks in detail about how to conduct these studies, term(s) are assigned major. (See Thesaurus front matter or Indexing Handbook for "exact overlap" descriptors and associated Pubtype codes.)

b. When indexing educational practitioner documents or guides, care is taken to include a descriptor (minor) describing the type, e.g., Lesson Plans, State Curriculum Guides, Resource Materials, Units of Study, Instructional Materials, Textbooks, Workbooks, Faculty Handbooks, Laboratory Manuals, Study Guides, Test Manuals.

c. The minor descriptor Questionnaires and the pubtype code 160 are used for documents that include the actual survey instrument.

5. Identifiers

a. Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus.

b. Do not be reluctant to use identifiers, but avoid making up words or using the author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent.

c. Always index the following types of identifiers when they're the subjects of documents (using the IAL precedents):
   - Institution or association names (not indexed if they merely prepare a report, unless it is an official position paper or similar statement; avoid indexing public school names unless they're particularly significant-- instead, index the name of the school district);
   - College or university names;
   - Persons;
   - Laws (enacted, not proposed);
   - Geographic Regions;
   - Foreign country names (coordinated with the minor descriptor Foreign Countries -- ERIC's idiosyncrasies for Canada and the U.K. are followed);
   - Test names;
   - Computers;
   - Computer Programs;
   - Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Analogies, Author Reader Relationship, Collaborative Learning, Cultural Literacy, Editorial Policy, Entertainment, Metaphysics, Plot (Fiction), Press Law, Professionalism, Rhetorical Effectiveness, Riddles, Right to Read, Romance Novels, Structuralism, Supreme Court, Uncertainty Reduction, Vocal Intensity;
   - New terms in the field, especially those being written about frequently.

6. Target Audience

a. Use the audience field only when the document or article explicitly directs itself to an audience, e.g., "...intended for school teachers..." Don't guess who might want to use it.

b. Even if the article is in a journal published by a research society, teacher association, administrator organization, etc., only use the audience field when an article specifically mentions a particular audience. If not absolutely clear, leave this field blank.

7. Index Terms versus Terms in the Abstract

a. Indexed descriptors must actually be in the ERIC Thesaurus (only main terms are indexable). Identifiers must either be in the IAL or, if new, reflect the precedents established by the IAL. (Thesaurus "use references" are non-indexable even as identifiers.)

The abstract is reserved for the author's words, i.e., the actual language of a document.

b. Do not purposefully substitute ERIC index terms for an author's terminology in the abstract.

8. Overindexing

a. Very broad descriptors should be avoided where possible, especially as majors.

EX: Curriculum, Evaluation, Reading, Speech, Children.

b. Do not trivialize the indexing process by assigning terms "automatically" in a certain way:

EX: Continual use of peripheral "population" terms such as Males, Females, (iden) Male Female Relationship, Editors, (iden) Editor Role, (iden) Journalists, (iden) Journalist Role, when the more inclusive descriptors Sex Differences, Editing, and Journalism adequately cover the subject.

c. Pubtype and methodology index terms such as Correlation, Comparative Analysis, Case Studies, Questionnaires, and Surveys are assigned minor status to facilitate computer searching. Common errors to be avoided in pubtype/methodology indexing include:

-- Use of the broad term Surveys when an appropriate narrower term is available, e.g., National Surveys, State Surveys, School Surveys.

-- Overindexing the descriptor Attitude Measures on survey documents (a practice that deters utility of the term for subject retrieval) instead of appropriately coordinating ...Surveys with a specific term from the Attitudes hierarchy, e.g., Reading Attitudes, Student Attitudes.

-- Overindexing such identifiers as "Historical Background" and "Students as Subjects," especially as majors; such indexing serves no useful purpose and invalidates any subject-retrieval utility these terms could have (i.e., nearly all research documents contain background statements and most [in ERIC] have students as subjects). Consider an example.

A document "An Historical Study of Elementary School Reading," incorrectly indexed with:

```
DESC_*Elementary Education; *Reading
     Instruction; *Reading Research
IDEN_*Historical Background; *Students as
     Subjects
```

could be corrected as follows:

```
DESC_*Educational History; Elementary Education;
     *Elementary School Students; *Reading
     Instruction
IDEN_(None)
PUBTYPE_060; 143
```

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE ON EDUCATIONAL MANAGEMENT

Prepared by

Mary Lou Finne

May 1989

UNIVERSITY OF OREGON

IN-HOUSE INDEXING GUIDELINES

ERIC Clearinghouse on Educational Management

DESCRIPTORS

System Averages (including identifiers): 12 for RIE documents; 10 for CIJE articles.

MAJOR DESCRIPTORS: At least one must be assigned to each document. Remember that you can have 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers. Think of 5 and 2 or 6 and 1. Be sure to count the asterisks so that you do not use too many majors. Try to have your major descriptors summarize the document.

Major/Minor

Unless the following are the subject of the document, do not major: educational level, age level, form of document, and research methodology. Watch the Thesaurus for terms that say "Do no major unless subject of document."

For example, ANNOTATED BIBLIOGRAPHIES can be majored, BIBLIOGRAPHIES cannot even be used as a descriptor unless the document is about writing bibliographies. (Use DT=131)

Read the comments under the term in the Thesaurus. You will find some terms that say USE--e.g. "Videotape Cassette Recorders," USE VIDEOTAPE CASSETTES and VIDEOTAPE RECORDERS. Attempting to index with nonindexable USE references is the most common indexing error made by new document analysts.

EDUCATIONAL LEVEL TERMS

Get into the habit of assigning educational level first, before any other indexing is done. Much of our material refers to the K-12 grade level - use ELEMENTARY SECONDARY EDUCATION. However, always use the most specific education level term possible. For example, use SECONDARY EDUCATION for grades 7-12 (students aged approximately 11-18), or HIGH SCHOOLS for grades 9-12 (students aged approximately 13-18).

MIDDLE SCHOOLS is a descriptor, but not an educational level term, so you must also use JUNIOR HIGH SCHOOLS and/or INTERMEDIATE GRADES.

ERIC CLEARINGHOUSE ON EDUCATIONAL MANAGEMENT
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SPECIFICITY and GENERALITY

Be specific but try to give the searcher a couple of paths to access the information, e.g., for a research paper on principals, along with Principals, one might use Administrator Role, Administrator Attitudes, Administrative Policy, School Administration, etc. This will help the person wanting principals only and also will help someone doing a broader search of principals, superintendents, assistant principals, etc.

Watch the specificity of the document, i.e., an article on school law discusses dismissal of personnel but never says teacher dismissal, so use the broader term Dismissal (Personnel).

Descriptor-Court Litigation. Use as a major when it is a summary or an administrator guide about school law cases; also use DT=090. Use as a minor when discussing one or two court cases, make a judgment call on whether Legal Responsibility or a similar descriptor is needed.

SPECIAL CASES

Use the descriptor Public Schools if the document or article refers to something that could ONLY be at a public school; i.e. elected boards of education. If it is about something that could also be applicable at a private school; i.e., ways that teachers and administrators could have better relationships, then only use the appropriate education level term. If the title includes Public Education/Schools, i.e. The State of Public Education in the U.S. today, then include Public Education or Public Schools as a major term. Use Private Education, Private Schools, or an appropriate narrower term (e.g., Parochial Schools) when that is the exclusive topic. If the article compares and contrasts public and private schools, then use both "public" and "private" descriptors.

IDENTIFIERS

Don't be reluctant to use identifiers.

Always index the following types of identifiers when they're the subjects of documents (use the IAL precedents):

Institution or association names
(don't index them if they merely prepare a report, unless it is an official position paper or similar statement)

College or university names

Persons

Laws
(enacted, not proposed)

Geographic regions

Foreign country names
(be sure to note ERIC's idiosyncrasies for Canada and the U.K.)

Test names

Computers

Computer programs

Specific methods, theories, ideas, etc., not found in Thesaurus, e.g., Risk Management, Professionalism, First Amendment

New terms in the field, especially those being written about frequently

Maximum of 2 major identifiers. If the document is about a foreign country (including Canada) always major the name of the country as an identifier and use Foreign Countries as a minor descriptor. In the rare case that the document concerns 6 foreign countries, major the descriptor Foreign Countries and, if appropriate, 2 of the 6 "country" identifiers. Note that identifiers for Canada and the U.K. name the province or state alone, followed by the city or other geopolitical subdivision in parentheses, just as we do with U.S. states and cities. Don't say Canada or United Kingdom unless it is about the whole country. Don't say Great Britain unless you mean England, Scotland, and Wales, but not Northern Ireland.

Name of school. If it is a higher educational institution and an important subject of the document, name it; if it is a specific public grade or high school, it should not be named as an identifier unless it is really outstanding. Instead, index the school district's name.

Name of school district. List as an identifier if that is an important subject of the document. Look up the school district in the Identifier Authority List to see how it is listed; if it is not there, look at the Directory of Public School Systems in the U.S. and see how it is listed since the naming system varies by states.

Except for parentheses, no punctuation in identifiers, even if it is used in the title and the abstract. Law cases--use Jones v. Jones in the abstract, but the Identifier would be Jones v Jones. Also look up court cases in section 14 of the Identifier Category Display.

TARGET AUDIENCE

Catalog the Target Audience field only if the article or document explicitly directs itself to an audience, e.g., ". . . intended for school administrators . . ." Don't guess who might want to use it. Even if the article is in a journal published by an organization of administrators, school board members, etc., only use the audience field when an article specifically mentions a particular audience.

DOCUMENT TYPE

055 "how to do it" for administrators

141 how our school system does it

142 an evaluation of a teaching practice or change in school conditions

143 research paper with real data, i.e., a sample of 25 teachers, interviews with 30 families; it doesn't have to meet strict methodological sample design criteria

021 conference proceedings if it includes all of the papers or a summary

150 a single conference paper or speech. Cannot be used alone, usually is also a 120 and/or a 143

022 serials. Use for publications that have the month and year on them

160 Use with the descriptor Questionnaires (minor) on documents that include the actual survey instrument

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
HANDICAPPED AND GIFTED CHILDREN

Prepared by

Judi Conrad

May 1989

INHOUSE INDEXING GUIDELINES

ERIC Clearinghouse on Handicapped and Gifted Children

1. EC documents are almost always indexed with one or more terms taken from the attached list of exceptionalities. EC almost always majors one or more of these exceptionality terms.

2. Sometimes euphemisms must be translated into descriptors, especially in the area of mental retardation (e.g., moderately handicapped almost always means moderate mental retardation); EC always refers to the context of the document or article to make such a determination.

3. EC almost always includes the disability concept which appears in the index terms in the abstract as well. However, while indexed descriptors must reflect the language of the Thesaurus, concepts expressed in the abstract should reflect the actual language of the document or article. EC checks to see if the index terms adequately reflect all the concepts presented in the abstract.

4. EC assigns educational level descriptors first, before any other indexing is done. EC alternately attempts to assign one or more age level descriptors when educational levelers are inappropriate.

5. EC always relies on the text when there is a conflict between the author's abstract and the text.

6. EC usually majors one or more (but no more than three) exceptionalities. However, all exceptionalities covered significantly by a document are indexed.

7. EC usually indexes the major term *Disabilities when a document talks about more than three disabilities or the handicapped in general.

8. EC believes the usefulness of mandatory education level terms is questionable when indexing documents or articles dealing with the severely mentally retarded; in such instances, therefore, an age level descriptor is generally substituted.

THE COUNCIL FOR EXCEPTIONAL CHILDREN OPERATES THE ERIC CLEARINGHOUSE ON HANDICAPPED AND GIFTED CHILDREN UNDER A CONTRACT WITH THE OFFICE OF EDUCATIONAL RESEARCH AND IMPROVEMENT, U.S. DEPARTMENT OF EDUCATION

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9. EC reserves major descriptors for pure subject content. Other content aspects such as methodology and document type are assigned minor status. For instance, EC covers a fair amount of personal narratives (e.g., "How I Coped with My Disability"). Documents such as these are indexed with the minor descriptor Personal Narratives and generally coded Pub Type 120. Narrations of personal successes by practitioners are alternately coded Pub Type 052 or Pub Type 053, since the intent is usually for others to replicate the practices.

10. EC believes that the amount of indexing should reflect the size and depth of the document or article (e.g., a large document should almost certainly have more descriptors than a five page journal article).

11. EC avoids indexing and especially majoring very general terms.

12. EC translates the concept profoundly hearing impaired and hearing losses in the >75 db range to the ERIC descriptor Deafness.

13. EC uses the term Limited English Speaking rather than Bilingualism for handicapped speakers of limited English as a foreign language. Such populations additionally require an exceptionality descriptor.

14. EC uses the term College Students (or an NT), the leveler Higher Education (or Two Year Colleges), and an exceptionality descriptor when indexing material dealing with disabled college students. The exceptionality term may be majored or minored, as appropriate.

15. EC adds the term Case Studies to single subject research studies (of which there are a considerable number in special education), so that they may be eliminated if the user is not interested in single subject studies. Lately, however, we have also been using the identifier Single Subject Research Design.

16. EC uses Accessibility (for Disabled) to cover a broad spectrum of access, since the scope note includes programs as well as buildings. We additionally use Physical Mobility or Visually Handicapped Mobility to describe physical access.

17. EC uses the 160 pub type and the minor descriptor Questionnaires on documents that contain the actual survey instrument.

18. EC attempts to index the broad concepts of each chapter in a book of readings to assure adequate representation, e.g., a chapter that deals with five or six major disabilities would be indexed under the broad term Disabilities, and, if significantly covered, the specific disability terms; a chapter on the gifted learning disabled would be indexed under Gifted Disabled, Learning Disabilities, and the identifier Gifted Learning Disabled. The broadest concepts for the entire book would carry the majors.

Exceptionality Terms

ERIC Clearinghouse on Handicapped and Gifted Children

DISABILITIES
___ Disabilities
___ Severe Disabilities
___ Mild Disabilities
___ Congenital Impairments
___ Adventitious Impairments
___ Multiple Disabilities
___ Deaf Blind

PHYSICAL DISABILITIES
___ Physical Disabilities
___ Cleft Palate
___ Cerebral Palsy
___ Amputations

MENTAL RETARDATION
___ Mental Retardation
___ Mild Mental Retardation
___ Moderate Mental Retardation
___ Severe Mental Retardation
___ Downs Syndrome
___ Developmental Disabilities

LEARNING DISABILITIES
___ Learning Disabilities
___ Language Handicaps
___ Aphasia
___ Dyslexia
___ Attention Deficit Disorders
___ Perceptual Handicaps
___ Hyperactivity
___ Neurological Impairments
___ Minimal Brain Dysfunction
___ Head Injuries

MENTAL DISORDERS
___ Mental Disorders
___ Emotional Disturbances
___ Neurosis
___ Psychosis
___ Autism
___ Schizophrenia
___ Behavior Disorders

COMMUNICATION DISORDERS
___ Communication Disorders
___ Reading Difficulties
___ Language Handicaps

SPEECH HANDICAPS
___ Speech Handicaps
___ Articulation Impairments
___ Cleft Palate
___ Delayed Speech
___ Voice Disorders
___ Aphasia
___ Stuttering

HEARING IMPAIRMENTS
___ Hearing Impairments
___ Deafness
___ Partial Hearing

VISUAL IMPAIRMENTS
___ Visual Impairments
___ Blindness
___ Partial Vision

GIFTED
___ Gifted
___ Academically Gifted
___ Talent
___ Gifted Disabled
___ Creativity
___ Gifted Learning Disabled

CHILD ABUSE
___ Child Abuse
___ Sexual Abuse
(Child Abuse and Sexual Abuse are used for "Child Sexual Abuse")

19. EC makes the following distinction between Individualized Education Programs, Individual Instruction, and Individualized Instruction: Individualized Education Programs (IEPs) are required by law and are clearly prescribed. Individual Instruction is simply one-on-one instruction; and Individualized Instruction may or may not be one-to-one instruction.

20. EC reserves the term Special Education to index broad issues, trends, and concerns in the field. Special Education is <u>not</u> automatically assigned to every document indexed by EC.

SPECIAL HEALTH PROBLEMS

___ Injuries
___ Diseases
___ Alcoholism
___ Allergy
___ Anemia
___ Sickle Cell Anemia
___ Anorexia Nervosa
___ Bulimia
___ Cancer
___ Communicable Diseases
___ Heart Disorders
___ Rubella
___ Veneral Diseases
___ Hospitalized Children
___ Homebound
___ Diabetes
___ Drug Addiction
___ Hypertension
___ Obesity
___ Occupational Diseases
___ Poisoning
___ Lead Poisoning
___ Seizures
___ Epilepsy
___ Asthma
___ Medically Fragile

NOTE: Underscored terms are Identifiers, not Descriptors.

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE ON LANGUAGES AND LINGUISTICS

Prepared by

Darla Domke

May 1989

ERIC Clearinghouse on Languages & Linguistics

Charles Stansfield, Director
Jeanne Rennie, Associate Director

ERIC Clearinghouse on Languages and Linguistics
IN-HOUSE INDEXING GUIDELINES

Indexer's Purpose: to find the concepts that best reflect the content of a document and "translate" those concepts into appropriate descriptors (and identifiers, where appropriate), so users may gain access and retrieve the information they need.

Rule 1: *Descriptors/identifiers must capture all the significant, essential ideas of the entire document: the actual content, the main idea.* Supplemental index terms (identifiers) are used for specific entities and concepts that cannot be conveyed by descriptors. Index terms must reflect the language and precedents of the ERIC vocabulary rather than the language and vocabulary of the document.

Rule 2: *Concepts must be indexed at their level of specificity.* If a document refers to a university-level second language program, the document should be indexed with *College Second Language Programs* instead of *Second Language Programs*.

When in doubt about whether to use a particular term, ask yourself whether users searching that term would want to see the document retrieved, or whether they would be disappointed.

Rule 3-1: *All concepts of a document must be translated, wherever possible, into appropriate ERIC descriptors, found in the ERIC Thesaurus.* Descriptor vocabulary for a given concept may not be the same as the vocabulary used in the document. It is important, therefore, to use the Thesaurus to locate the descriptor that is closest in meaning to the concept referred to in the document. Descriptors cannot be made up. All descriptors must come from the *ERIC Thesaurus*.

A. Remember to index the ***mandatory education level*** descriptors first, before any other indexing is done. For every document, ask yourself whether an educational level descriptor should be assigned. If an educational level descriptor is inappropriate, consider using an age level descriptor. Leveling descriptors should normally be minor.

B. Always ask yourself whether or not a document deals with a ***specific population*** (e.g. ethnic group? socioeconomic status? nationality? intelligence or ability level? physical or emotional characteristic? sex? personnel group?). Minor the population group descriptor/identifier unless it is the specific subject of a document.

Rule 3-2: If you can't find a descriptor to fit a concept, check the Identifier Authority List (IAL). *All concepts of a document concerning specific entities or new terminology not found in the Thesaurus must be "translated" into appropriate ERIC identifiers, found in the IAL.* Don't be reluctant to use identifiers, but avoid making up words or using an author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent. No punctuation other than parentheses (for qualifying) may be used.

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Always index the following types of identifiers when they are the subjects of documents:

- •Institution or association names (not indexed if they merely prepare a report, unless it is an official position paper, description of a particular program, or similar statement);
- •College or university names (EX: University of Illinois Urbana Champaign--note there's no hyphen between "Urbana" and "Champaign");
- •Persons;
- •Laws (enacted, not proposed);
- •Geographic Regions;
- •Foreign Country Names (coordinated with the minor descriptor *Foreign Countries*-- be sure to note ERIC's idiosyncracies for Canada and the U.K.);
- •Test names;
- •Computers (EX: Apple Macintosh);
- •Computer Programs;
- •Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Anaphora, Natural Order Hypothesis (Language), Biliteracy, Chicanos (also, Chicanas)-- (note: *Chicanos -as* is "upindexed" to the descriptor *Mexican Americans*, then carried additionally as a supplemental identifier);
- •New terms in the field, especially those being written about frequently.

Rule 4: *Once descriptors have been found, they must be either majored (marked with an asterisk *), or minored. At least one major descriptor must be assigned to every document.* Despite the total number of descriptors and identifiers used, the absolute maximum number of majors is 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers. It is important not to over- nor under-index. Very broad descriptors should be avoided where possible, especially as majors. EX: *Modern Languages; Languages; Curriculum; Evaluation,* etc. Descriptors such as *Language Research , Statistical Analysis, Statistical Data* are generally avoided as well, since the publication type usually catalogs the concepts (PUBTYPE_143 or PUBTYPE_110), unless, of course, *Language Research,* etc., is the topic of the document.

Avoid over-indexing and over-majoring. Consider only the most significant and essential concepts of a document. Be conservative!!

ERIC/CLL's INDEXING IDIOSYNCRACIES

1. Documents on all modern languages except English, French, German, Spanish, Italian, and Russian, are indexed with *Uncommonly Taught Languages* in addition to the specific language name. Major *Uncommonly Taught Languages* only when UCTs in general, or when several specific UCTs or UCT families are the topic of a document.

2. Foreign countries are indexed as identifiers, with *Foreign Countries* serving as mandatory descriptor. Country names are subdivided by parenthetical qualifiers, e.g., *Mexico (Tijuana).* Note that identifiers for Canada and the U.K. name the province or state alone, followed by the city or other geopolitical subdivision in parentheses. Don't index *Canada* or *United Kingdom* unless you mean the entire country. Don't index *Great Britain* unless you mean England, Scotland, and Wales, but not Northern Ireland. Country names

are majored if they are the subject of a document. The descriptor *Foreign Countries* may be majored when it's the broad subject or when more than 2 country names are subject-indexed (i.e., more than the maximum 2 major identifiers).

3. All documents dealing with foreign languages at the elementary school level should be indexed with *FLES*.

4. English as a Foreign Language (EFL) and English as a Second Language (ESL) take the same descriptor, *English (Second Language)*. In the case of EFL, index the descriptor *Foreign Countries* and the foreign country or countries referred to in the document as (an) identifier(s).

5. Distinguish between the name of a language and its speakers. EX: *Japanese* is a descriptor used to refer to the language; *Japanese Americans* is a descriptor referring to Americans of Japanese origin; *Japanese People* is an identifier that refers to the Japanese living in Japan.

6. Minor descriptors such as *Correlation, Comparative Analysis,* and *Case Studies* should be used if appropriate to a document to facilitate computer searching. *Questionnaires* (minor) is used with PUBTYPE_160 for documents that include the actual survey instrument. Avoid using the broad term *Surveys* when an appropriate narrower term is available, e.g., *National Surveys, State Surveys, School Surveys.*

7. Journal writing as a technique to improve writing skills takes the descriptor, *Student Journals* and/or *Journal Writing,* not the descriptor, *Diaries.*

8. Use *English Instruction* for the teaching of native speakers of English only.

9. *Second Language Instruction* and *Second Language Learning* should be majored only when the specific topic of a document. More specific descriptors should be majored, e.g., *Suggestopedia, Communicative Competence (Languages), Language Tests,* etc. Major *Second Language Learning* when the topic of a document is "Second Language Acquisition."

10. The descriptor, *Language Acquisition,* should be used only when referring to native language acquisition.

11. For descriptions of foreign language programs, use more specific descriptors like *Immersion Programs or College Second Language Programs* when appropriate instead of *Second Language Programs.*

12. A concept derived from, for example, linguistic theory need not be written as a new identifier. EX: A document on "Generalized Phrase Structure Grammar" may be indexed with the descriptors, *Phrase Structure* and *Transformational Generative Grammar.* It is important not to make up new identifiers indiscriminately. Look up the word or phrase in the *IAL* first. Try every way to correlate the new concept with already existing descriptors or identifiers.

13. The term "Aspect" in grammar does not refer to tense of verbs, but rather to the temporal constituency of a situation. The descriptor, *Tenses (Grammar)* should be avoided when the document refers to "Aspect" of verbs, unless "tense" of verbs is also discussed. Use the identifier, *Aspect (Verbs)* for these documents.

CATALOGING

Levels: For Level 3 documents, photocopy the cover page, ISBN and availability page, table of contents, preface or introduction pages and send to Facility with shipment. Number of pages must be included in Level 3 citations, e.g., PAGE_129.
Level 2 documents that have reproduction problems must state the situation in the Note field, e.g., "Print marginally legible." (See EPM, Section V, "Descriptive Note," for additional examples.)

Title field: For journals in RIE, put title, volume, and number of journal in title field and in the journal field if entire journal is entered. If only one article is entered, put the name of the article in the title field and the journal name, volume, number, pagination, and date in the journal field. Usually, "Volume" and "Number" are written out if part of a main title, and abbreviated "Vol." and "No." in a subtitle, but catalogers are generally encouraged to follow the format given on the journal cover or title page.

Note field: Analytics!!! The things that drive Carolyn up the wall! The latest information from the Facility in cataloging sibling documents for analytics (not in the EPM) is: (1) **do not** include individual page numbers; (2) **do not** include city and publisher ; and (3) **do not** include the FL numbers for related documents; (4) **do** include only the date of the parent document followed by a semicolon, followed by its FL No. [" see FLxxx xxx."]
For the parent document, do refer to individual articles; EX: "For (selected) individual papers, see FLxxx xxx-xxx."
OTHER: Put period at end of note field. Refer to physical layout of document when appropriate: ["NOTE_Small light print may not reproduce clearly."]

Pubtype: 022 for series

Inst: a series title may or may not have an institutional source (individuals do not generally publish series)

Geo: In documents from England, the GEO_ field should read: *United Kingdom; England.* Documents from Australia and Canada should read: either Australia or Canada, followed by the name of the specific province or territory, e.g., *Australia; Australian Capital Territory.* Identifiers for Australia are formed with the country name, followed by a city or other unit in parentheses, e.g., *Australia (Brisbane).* Identifiers for Canada and the United Kingdom, however, are structured by province (Canada) or major political dividion (U.K.), e.g., *Quebec (Montreal), England (London).* Use identifiers *Canada* or *United Kingdom* only when the topic is the entire country. Don't use *Great Britain* as an identifier unless the topic is the island of Great Britain, i.e., including England, Scotland, Wales, but excluding Northern Ireland. Consult the IAL for additional appropriate forms.

Avail: For journals that go into RIE, don't use semicolons in entry. An individual's name is rarely included with availability address. Read release form carefully, for it may contain more up-to-date availability information than is indicated in the document. Include UMI availability when indicated on the release form (usually Level 3 documents); show order number where available, but exclude UMI prices since they change frequently. EX: AVAIL_University Microfilms International, 300 N. Zeeb Rd., Ann Arbor, MI 48106 (Order No. 88-14955). For journals not available through UMI, list complete ordering information, including price if available. EX: AVAIL_Cambridge University Press, 32 E. 57th St., New York, NY 10022 (institutions- $34.00, individuals- $20.00).

For foreign journals entered in RIE, translate cover page and any other pages with availability information.

Descriptors/Identifiers: see guidelines for indexing

Abstracts: An opening statement summarizes the content of the document. Further statements may make references to appendices, survey, sample lesson plans, materials, etc.

Punctuation: Prepositions in titles are in lower case; Identifiers do not take punctuation (except parentheses). Rules of punctuation with quotation marks are as follows:

"This is a sentence."
"This sentence,"
"This sentence...";
"This sentence":

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE ON HIGHER EDUCATION

Prepared by

Lynn Barnett

May 1989

ERIC EDUCATIONAL RESOURCES INFORMATION CENTER

Clearinghouse on Higher Education

THE GEORGE WASHINGTON UNIVERSITY

INDEXING GUIDELINES

BASIC:

1. Use the most recent edition of the working copy of the Thesaurus.
2. Use the most recent edition of the Identifier Authority List. Write in additions as you use new identifiers.
3. Keep your Thesaurus and IAL in a single notebook so you can refer to both at once.
4. Identify major descriptors and identifiers with an asterisk

NUMBER:

1. System average is 12 terms for RIE and 10 for CIJE, including both descriptors and identifiers. Index to the content level of the particular document or article.
2. Assign at least 1 major descriptor to every document or article.
3. Watch for too many majors. The total can't exceed 7 (5 descriptors and 2 identifiers or 6 desc and 1 iden).

SUITE 630 / ONE DUPONT CIRCLE / WASHINGTON, D C. 20036-1183 / (202) 296-2597

MAJOR/MINOR DESCRIPTORS:

1. Be careful not to overload with more than two major descriptors beginning with the same word (important for manual searching).

2. Unless the following are the subject of the document, do not major:

   -- educational level (see discussion below about the concept of "higher education"). Assign first, before any other indexing is done.

   -- age level

   -- form of document (e.g., pubtype-type descriptors)

   -- research methodology (e.g., COMPARATIVE ANALYSIS, GRADUATE SURVEYS). Avoid use of broad term SURVEYS whenever possible.

   -- population studied (e.g., MINORITY GROUPS, COLLEGE PRESIDENTS)

   -- very broad or general descriptors (e.g., PROGRAM DESCRIPTIONS, TABLES (DATA), MODELS)

3. Always use FOREIGN COUNTRIES as a minor descriptor for documents/articles about countries and populations other than the U.S. Also use the specific country name (and geographic subdivisions) as a major or minor identifier as appropriate.

   Use the descriptor DEVELOPING NATIONS (used for "Third World"), in addition to FOREIGN COUNTRIES, only when the subject is national or international social and economic development. DEVELOPING NATIONS is a socioeconomic concept and should be used only in that sense (e.g., don't use it for "Teaching Reading in the Sudan," unless the idea is reading for economic development, etc.)

   DEVELOPING NATIONS, when used, is often a major descriptor.

   The descriptor DEVELOPED NATIONS (i.e., industrialized countries) also a socioeconomic term, may also be indexed along with FOREIGN COUNTRIES when appropriate.

   Both DEVELOPING NATIONS and DEVELOPED NATIONS may be major or minor descriptors, depending on the document.

EDUCATIONAL LEVEL

1. HIGHER EDUCATION should be on nearly every document unless it is totally uncalled for and no level is applied, or if POSTSECONDARY EDUCATION is more appropriate.

2. POSTSECONDARY EDUCATION should be on documents that include discussions of technical institutes or proprietary schools as well as two- or four-year colleges. POSTSECONDARY EDUCATION should not be used on documents dealing with American two- and four-year colleges only. (Use HIGHER EDUCATION on them.)

3. Include TWO YEAR COLLEGES when that concept is important to the document. Use it without HIGHER EDUCATION if a document refers to just two-year colleges or associate degree programs. (Such documents are typically indexed by the JC Clearinghouse, but sometimes they come to HE as part of a series or part of the ASHE conference papers, which we put in RIE as a group.)

4. Look over foreign documents/articles carefully. Many times the descriptor POSTSECONDARY EDUCATION is better than HIGHER EDUCATION, especially for non-U.S. materials referring to "colleges" or other "tertiary education" institutions that may not offer four-year or higher professional degrees. Note that the concept of "universities", however, is more universal and materials referring to "universities" generally can be indexed with HIGHER EDUCATION.

"COLLEGE" TERMS

1. Rarely use the single-word descriptors COLLEGES or UNIVERSITIES. Use a "college" or "university" term.

2. Use the descriptor HIGHER EDUCATION as a major when the state of higher education as a whole is addressed. An example is a document titled "Colleges Need to Find Solutions to Today's Problems."

3. When a relevant specific "university" descriptor cannot be found, use the closest "college" term (e.g., COLLEGE STUDENTS for "university students"). When a relevant specific "college" descriptor cannot be found, use the closest "school" descriptor (e.g., SCHOOL SECURITY for "campus security"). Note concepts that may be candidates for new "college" descriptors.

4. Use the appropriate "teacher" descriptor if the specific "faculty" descriptor is not in the Thesaurus (e.g., use TEACHER ATTITUDES for "faculty attitudes").

5. Avoid an "educational" term if a "college" term is available (e.g., use COLLEGE PLANNING rather than EDUCATIONAL PLANNING).

INSTITUTIONAL OR STUDENT TYPE

1. Always identify the type of institution as specifically as possible. Use such descriptors as BLACK COLLEGES, PRIVATE COLLEGES, STATE UNIVERSITIES, SMALL COLLEGES, RESEARCH UNIVERSITIES, URBAN UNIVERSITIES. These descriptors will usually be minor. (See COLLEGES in the Thesaurus hierarchical display.)

2. When a document identifies a specific student type, use the relevant specific descriptor(s) (e.g., MEDICAL STUDENTS, GRADUATE STUDENTS, COLLEGE TRANSFER STUDENTS, COLLEGE FRESHMEN, UNDERGRADUATE STUDENTS, etc.) and not the broad term COLLEGE STUDENTS.

FORM DESCRIPTORS

1. Use QUESTIONNAIRES (as a minor) and pubtype 160 on documents that include the actual survey instrument.

2. Include as minor descriptors such terms as CASE STUDIES, STATE SURVEYS, NATIONAL SURVEYS, SCHOOL SURVEYS, COMPARATIVE ANALYSIS, TREND ANALYSIS, FOLLOWUP STUDIES, or LONGITUDINAL STUDIES when appropriate, in order to facilitate retrieval. If a document talks in detail about how to conduct these studies, major the descriptor.

MISCELLANEOUS

1. Assign the descriptor FOREIGN COUNTRIES (minor) to documents about non-U.S. countries and populations, and an identifier (usually major) to indicate the country name. Qualify the country name with a geographic subdivision, as appropriate -- e.g., MEXICO (MONTERREY).

2. Use COURT LITIGATION for anything discussing court cases. Make a judgment call on whether LEGAL RESPONSIBILITY or a similar descriptor is needed.

3. Use SCHOOL HOLDING POWER and/or ACADEMIC PERSISTANCE for student retention. "Dropout" descriptors may or may not be relevant.

4. Use EDUCATIONAL FINANCE sparingly, only for broad discussions. Instead, refer to "financial" or "costs" descriptors. Major it even more sparingly.

5. Use the identifier PAYING FOR COLLEGE for documents on how to finance a college education.

6. Use POSTSECONDARY EDUCATION AS A FIELD OF STUDY only when the document is about master's or doctoral programs or curriculum in such areas as higher education administration or college student personnel service (also known as "student affairs"). Use of this term should be rare.

7. Descriptors must be in the ERIC Thesaurus. Identifiers must either be in the IAL or, if new, reflect the style of similar terms in the IAL (e.g., college names, court cases, etc.)

8. In the abstract, don't "translate" the author's language into descriptor terminology. The abstract is reserved for the author's own words (the actual language of the document). This gives the searcher more options for finding a concept, especially something new that hasn't evolved yet into "educationese."

IDENTIFIERS -- Refer to the Identifier Authority List (IAL).

1. Always index the following types of identifiers when they're the subjects of documents:

   -- college or university names (many HE documents have this type of identifier) -- e.g., MIAMI UNIVERSITY OH

   -- association or organization names (but don't index them if they merely prepare the report, unless it is an official position paper or similar statement)

   -- test names (e.g., GRADUATE RECORD EXAMINATIONS)

   -- geographic regions (e.g., UNITED STATES (SOUTH), CARIBBEAN).

   -- foreign country names (e.g. FRANCE; AUSTRALIA (BRISBANE)).

      Be sure to note ERIC's idiosyncrasies for Canada and the United Kingdom. Identifiers for Canada are structured by province, e.g., QUEBEC (MONTREAL). Those of the U.K. are structured under one of four geopolitical divisions, e.g., ENGLAND (LONDON); SCOTLAND (EDINBURGH); WALES (MONMOUTHSHIRE); NORTHERN IRELAND (BELFAST). Use identifiers CANADA and UNITED KINGDOM only when the topic is the entire country. Don't use GREAT BRITAIN as an identifier unless the topic is the island of Great Britain (i.e., including England, Scotland, and Wales, but excluding Northern Ireland).

   -- persons

   -- laws (enacted, not proposed)

   -- computers/computer software

-- specific methods, theories, ideas, etc., not found in the Thesaurus (e.g., SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANTS; PARENT LOANS FOR UNDERGRADUATE STUDENTS; TINTO METHOD; ENVIRONMENTAL SCANNING).

-- new terms in the field, specially those being written about frequently -- in our case, terms like CULTURAL LITERACY; PARTNERSHIPS IN EDUCATION; STRATEGIC PLANNING; LOAN DEFAULT; TUITION PREPAYMENT; PAYING FOR COLLEGE; COST CONTAINMENT

2. Sometimes unique identifiers (usually major) will be assigned to a collection of documents important to retrieve as a group. Examples are:

   -- *AAUP CONTRACTS (for collective bargaining contracts collected for ERIC by the American Association of University Professors);

   -- *ASHE ANNUAL MEETING (for papers presented at the conference of the Association for the Study of Higher Education, and submitted to ERIC in lieu of a published proceedings);

   These specific identifiers will be noted on the processing sheet that accompanies each document.

3. Some documents that are part of a publication series have a standard identifier. For example, the American Association of Collegiate Registrars and Admissions Officers (AACRAO) submits "country" reports that describe a foreign country's education system and that are designed to help colleges place foreign students properly in American institutions. They are indexed with the major descriptor *STUDENT PLACEMENT and two major identifiers: country name (e.g., *IRAQ) and *FOREIGN EDUCATIONAL CREDENTIALS. (This latter could become a descriptor.)

LB/5-89

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE ON INFORMATION RESOURCES

Prepared by

Barbara Minor

May 1989

ERIC Clearinghouse on Information Resources
030 Huntington Hall
Syracuse University
Syracuse, NY 13244-2340
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School of Education / School of Information Studies

SPECIAL INDEXING IN THE ERIC CLEARINGHOUSE ON INFORMATION RESOURCES

DESCRIPTORS

Computer Assisted Instruction: UF computer-based instruction
instructional uses of computers
computer-based learning (Brit.)

Computer Managed Instruction: use when the computer system is used to monitor progress, prescribe instruction, etc., but not for the delivery of instruction.

Computer Uses in Education: use ONLY when BOTH instructional and administrative applications are involved.

Computer Oriented Programs: we almost never use this term; we used to use it as we now use Computer Uses in Education.

Note: most computer docs/articles added to ERIC in recent years concern "personal computers" or "micros," but, because such words are often not in an author's text, the indexer isn't reminded to index the term Microcomputers. We try to alert users that searches using the descriptor Microcomputers may be too restrictive and lead to unrepresentative results.

Instructional Development: ID includes the whole process from needs assessment through the design, production, and formative and summative evaluations of instructional materials/programs.

Electronic Mail: ALANET — ALA0184; BITNET — ERIC @ SUVM

Instructional Design: this more limited concept is concerned with the design of teaching materials and selection of appropriate teaching methods.

Educational Technology: includes both Instructional Development and Instructional Design as well as the use of audiovisual materials, computers, programed learning, etc. We use it only for documents/articles that use the term, i.e., if there is not a more precise term (Multimedia Instruction, Audiovisual Instruction, etc.). The term Information Technology is frequently used in documents that talk about Educational Technology, and frequently, these documents wind up focusing on computers. It all gets very interesting. . .

Academic Libraries: used for college and university libraries in general.

College Libraries: used for a specific academic library.

Note: the mandatory level descriptor Higher Education is used with both of these terms.

Learning Resources Centers: this is used for library media centers in both K-12 and community/junior colleges. The appropriate level descriptor is used with the term. If School Libraries is the term used in an article or document, we use that term. Sometimes we use both. . .

Online Catalogs: this is used in preference to Library Catalogs and Online Systems, which we used before this term graduated to descriptor status. It is also used for Online Public Access Catalogs.

Online Searching: this is used in preference to Information Retrieval if the searching is indeed being done online. (We used to use

Information Retrieval and Online Systems for this concept.) But Information Retrieval can be used more generally, as can Search Strategies.

Library Automation: refers to the use of computer systems in libraries for management (e.g., circulation, statistics) as well as online catalogs. This might be the equivalent of "Computer Uses in Libraries". . .

IDENTIFIERS

Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus. We always index the following types of identifiers when they're the subjects of documents (using the IAL precedents):

- Institution or association names
  (not indexed if they merely prepare a report, unless it is an official position paper or similar statement);
- College or university names;
- Persons;
- Laws
  (enacted, not proposed);
- Geographic Regions;
- Foreign country names
  (coordinated with the minor descriptor Foreign Countries--ERIC's idiosyncrasies for Canada and the U.K. are followed);
- Test names;
- Computers;
- Computer Programs;
- Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Boolean Logic, Hawthorne Effect, Information Society, Learner Control, Screen Format, Weeding (Library);
- New terms in the field, especially those being written about frequently.

Barbara B. Minor
Publications Coordinator
ERIC/IR
March 1989

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE FOR JUNIOR COLLEGES

Prepared by

Anita Colby

May 1989

UNIVERSITY OF CALIFORNIA, LOS ANGELES UCLA

BERKELEY · DAVIS · IRVINE · LOS ANGELES · RIVERSIDE · SAN DIEGO · SAN FRANCISCO SANTA BARBARA · SANTA CRUZ

ERIC CLEARINGHOUSE FOR JUNIOR COLLEGES INDEXING PRACTICES

ERIC CLEARINGHOUSE FOR JUNIOR COLLEGES
8118 MATH-SCIENCES BUILDING
405 HILGARD AVENUE
LOS ANGELES, CALIFORNIA 90024
(213) 825-3931

I. GENERAL

A. Number of Index Terms

1. Averages across the ERIC system are 12 for RIE documents and 10 for CIJE journal articles, including both descriptors and identifiers.
2. Index as specifically as possible while avoiding peripheral topics. Generally, citations with more than 20 descriptors deserve a second look. Consider the user's point of view by asking, "Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

B. Number of Majors

1. The maximum number of major index terms is 7, split into either of the following: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.
2. Narrowly focused topics may need fewer than 5 or 6 major descriptors.
3. Always assign at least 1 major descriptor.

C. Educational Level

1. For most documents, TWO YEAR COLLEGES will be assigned as the Educational Leveler.
2. Assign HIGHER EDUCATION to those documents that address articulation and transfer between two- and four-year colleges.
3. Assign POSTSECONDARY EDUCATION to documents that address short-term, non-degree, college-level education, e.g., contract courses with industry, terminal vocational education of less than two years, and community education programs. Assign also to documents addressing technical institutes and proprietary schools as well as two- and four-year colleges.
4. For documents dealing with articulation between high schools and two-year colleges, also add HIGH SCHOOLS as a leveler.

5. For two-year college programs that are not college-level, ADULT EDUCATION or ADULT BASIC EDUCATION may be more appropriate.

D. Age-Level Descriptors

1. We don't typically assign age-level descriptors.
2. We use ADULTS or ADULT LEARNING or ADULT STUDENTS (with ADULT EDUCATION or ADULT BASIC EDUCATION) on documents with major androgogical leanings.
3. Some two-year colleges operate programs for seniors (for which OLDER ADULTS, YOUNG OLD ADULTS and/or OLD OLD ADULTS is appropriate).

E. Publication Type Descriptors

1. Unless there is an exact overlap with PUBTYPE CODES, we assign publication type descriptors on a regular basis, particularly to identify study type; e.g. VOCATIONAL FOLLOWUP, GRADUATE SURVEYS, LONGITUDINAL STUDIES, PROGRAM EVALUATION, QUESTIONNAIRES, FOLLOWUP STUDIES, SCHOOL SURVEYS, COMMUNITY SURVEYS, etc. Unless the document talks in detail about how to conduct these studies, the term will be assigned as a minor descriptor. If a questionnaire is included in the document, assign 160 as PUBTYPE and assign QUESTIONNAIRES (as a minor) as a DESC.

F. Research Methodology Descriptors

1. We assign methodology descriptors if a substantial discussion of the method is included, but not if it is simply stated that a particular method is used (e.g., COHORT ANALYSIS, MULTIVARIATE ANALYSIS, etc.)

G. Population Terms

1. We index all disaggregated ethnic groups, also assigning MINORITY GROUPS or ETHNIC GROUPS, for more than three groups. ETHNIC GROUPS or MINORITY GROUPS may also be used alone if specific groups aren't delineated.
2. Our most commonly used population term is TWO YEAR COLLEGE STUDENTS. We major it and other descriptors such as STUDENT ATTITUDES, STUDENT CHARACTERISTICS, and ENROLLMENT TRENDS, if these are major variables in the document.
3. We identify the personnel group as specifically as possible (ADMINISTRATORS, COLLEGE PRESIDENTS, ACADEMIC DEANS, COLLEGE FACULTY, SCHOOL PERSONNEL.)
4. Other population characteristics that may need to be indexed are socioeconomic status, ability level, and other personal/demographic characteristics.

H. Foreign Countries

1. We assign FOREIGN COUNTRIES to every document about a country other than the U.S., adding the name of the country (and geographic subdivisions) to the IDEN field, usually as a major. We also assign DEVELOPING NATIONS and/or DEVELOPED NATIONS if the subject is national or international social and economic development.

I. Identifiers

1. We use the name of a state as a major identifier if the study/data is/are statewide.
2. We always index country names other than U.S., along with the descriptor FOREIGN COUNTRIES, when they are the subjects of documents.
3. We use the name of a school or organization as an identifier, if the school or organization that is the focus of the document is not also the INST or SPON. In cases in which the school/organization is the principal focus of the document (e.g., The History of the American Association of Community and Junior Colleges), the Association may be both INST or SPON and IDEN.
4. For laws, tests, people, regions, etc., we assign an IDEN only if a significant topic of the document.
5. Before using Descriptor-like Identifiers, we make sure that there isn't an existing descriptor that adequately covers the topic.

J. When in doubt, we check to see how a similar document has been indexed. If the possibility of scope overlap exists we pay particular attention to how other Clearinghouses have dealt with the topic.

II. SCOPE AREA

1. Institutional Setting

We identify the type of school as completely as possible

a. Use TWO YEAR COLLEGES on most documents -- add COMMUNITY COLLEGES or TECHNICAL INSTITUTES or appropriate colleges or universities term to specify type of two-year college involved.
b. Identify rural/urban setting; small school/large school; multicampus setting if this is a significant aspect of the document (i.e. if the findings issues etc. are in some way unique to that type of institution)

2. Specificity

We use the most specific term available. In order of preference: "college" terms, "school" terms, "educational" terms. Don't use a "college" and an "educational" term simultaneously (e.g., use COLLEGE PLANNING rather than EDUCATIONAL PLANNING).

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
ELEMENTARY AND EARLY CHILDHOOD EDUCATION

Prepared by

Norma Howard

May 1989

University of Illinois
at Urbana-Champaign

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Clearinghouse on Elementary and Early Childhood Education
805 West Pennsylvania Avenue
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ERIC/PS
IN-HOUSE INDEXING GUIDELINES

INDEXING BASICS

Checklist of important points to remember; see Indexing Section of ERIC Processing Manual or A/I Workbook for more complete information and discussion of indexing.

1. Up to 7 Major (*) index terms may be used on an RIE document or CIJE article. Must have at least 1 major Descriptor, and no more than 2 major Identifiers.

2. If 6 *Descriptors are used, only one *Identifier may be used.

3. If 5 *Descriptors are used, 2 *Identifiers may be used.

4. Descriptors and Identifiers are assigned either major or minor status, depending upon content of the document.

5. There is no limit on total numbers of Descriptors and Identifiers (just to give you a ballpark idea, average for CIJE is 10 and average for RIE is 12). Documents assigned more than 20 index terms may be over-indexed and deserve a second look.

6. Identifiers may be no longer than 50 characters, including spaces.

7. No punctuation marks such as hyphens or commas allowed in Descriptors or Identifiers. Parentheses () allowed.

8. Avoid using acronyms in Identifier field except for very widely known ones such as ERIC, UNESCO, and USSR. Spelled out versions are substituted for equivalent acronyms wherever possible. Occasionally, acronyms and other abbreviations must be used to keep within the 50-character limit.

9. Be sure to check singular or plural form of Descriptors and Identifiers-- must be entered properly or the Facility's **computer will kick it out. Improperly entered Descriptors are** deleted.Improperly entered Identifiers are flagged for editorial review; new Identifiers are also flagged.

10. The Rotated Descriptor Display is a very useful adjunct tool to the Thesaurus. Use it to find terms that have prefixes you may not think of and thus may not be able to find easily in the alphabetical display of the Thesaurus.

CAUTION: Never index from the Rotated Display by itself. It should be used only to lead you to terms in the main alphabetical Thesaurus. The Thesaurus is structured hierarchically via BTs (broader terms) and NTs (narrower terms), which help to show you how terms are used. Also, the Thesaurus gives SNs (Scope Notes) for terms, very important when deciding whether to assign them to a document or article. RTs (related terms) listed in the Thesaurus give you other important clues to terms to use.

Indexers should be aware that the main alphabetical Thesaurus only shows broader and narrower terms at the first hierarchical level. Only the Hierarchical Display provides complete hierarchies and the most specific available Descriptors.

11. Concepts to be indexed:

A. Population: groups or individuals studied or discussed (normally not majored unless they're the subjects of a document)

Types of terms that describe population--

1. **Educational (grade/academic) level**
   MUST be assigned if the document deals with it. Assign FIRST, before any other indexing is done. Major if the educational level itself is discussed,
   Examples: philosophy of, theory of, history of, important legislation concerning.
   Minor if the document concerns, but does not directly discuss, a particular educational level,
   Example: a study of peer relationships of children in a preschool classroom.
   Always use the most specific educational level term possible.
   Examples: use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).
   (See list of educational levels in Thesaurus front matter or in the Indexing Handbook.)
2. Age
3. Occupation
4. Ethnic group (race, religion)
5. Nationality
6. Intelligence or ability level
7. Physical/emotional characteristics
8. Socioeconomic characteristics
9. Sex

B. Subject: **content of the document**

Action concepts, materials concepts, curriculum concepts, etc.
Examples: Peer Relationship, Parent Child Relationship, Social Development, Childrens Television , Individualized Instruction, Arithmetic, Spatial Ability, Exploratory

Behavior, Naturalistic Observation.

12. Publication/Document type: Assign 1 to 3 codes from the pubtype list.

This is a separate field from the Descriptor and Identifier fields. Pubtype codes may be supplemented by Descriptors (usually minor) that aren't exact repetitions of the pubtype code wording. **(see list in front of Thesaurus or front section of the Indexing Handbook.)**

Examples:

Annotated Bibliographies	(supplements Bibliographies)
Reading Tests	(supplements Tests)
Language Research	(supplements Research)

13. Target Audience: This also is a separate field. Target Audience is assigned only when the document or article explicitly directs itself to an audience. e.g., "...intended for school teachers..." Don't guess who might want to use it. Even if the article is in a journal published by a research society, teacher association, administrator organization, etc., only use the audience field when an article specifically mentions a particular audience. If not absolutely clear, leave this field blank. TA=RESEARCHERS should be used only rarely; its use can be generally restricted to documents/articles that are so esoteric that they would be of very little or no interest to other audiences.

Additional Notes:

--Index to the level of specificity of the document. Never index up unless the broader term is equally the subject of a document.

--Index what's in the document, not what you think the implications are, or who you'd like to see use it. Consider the user's point of view by asking two questions: Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

--Avoid peripheral topics, i.e., don't index everything in the document, if it's only briefly mentioned; this would give the user false expectations of the document content. Document length is one criterion for judging appropriate numbers of index terms.

--If you can't find Descriptor terms to adequately index content of the document, use Identifiers. Look first in Identifier Authority List to see if there's something there already that's near enough. If not you'll need to construct one or more new Identifiers. In constructing new Identifiers, do not make up words or use an author's terminology

indiscriminately. Use precedents established by the IAL. (An author's language is preferred over an indexer's personalized style.) Each week give secretary list of any new Identifiers you've developed and Vocabulary Coordinator has ok'd. New IDs will be added to list on disk that is printed out periodically for indexers' use and to refer to when new Descriptors are being considered for Thesaurus.

INDEXING PRACTICES--ERIC/PS

PS indexers follow the indexing rules as set forth in the Processing Manual and clarified in Indexing Advisories.

To achieve consistency of indexing for certain indexing issues that arise regularly in documents and journal articles processed by PS, use the following guidelines:

1. When the topic is day care, use Early Childhood Education as the educational leveling term, unless the day care population is described more precisely, such as Elementary School Students (use Elementary Education leveling term), children in grades K-3 (use Primary Education leveling term), or preschool age children (use Preschool Education leveling term).

2. Primary School in British Isles, Australia and New Zealand is basically elementary education and should usually have the term Elementary Education as the educational leveler. (Avoid such paraphrasing in the abstract, however; the abstract is reserved for the author's words, i.e., the actual language of a document.)

3. Subjects of a study (e.g. Infants, Preschool Children, Elementary School Students) are assigned as majors when they are significantly discussed in the document. This is particularly important when there are no other major terms assigned that locate the level of the document contents (e.g. Childrens Television, Childhood Interests, Child Development).

4. Foreign Countries should be used as a minor Descriptor for documents about countries and populations other than the United States. (An easy way for computer searches to separate out non-U.S. documents by using NOT Foreign Countries). Additionally the name(s) of the specific country/countries (and geographic subdivisions) should be indexed in the Identifier field, e.g.:

Japan	
Alberta (Calgary)	Use "Canada" only for the whole country.
England	Use "United Kingdom" only for the entire nation. Don't use "Great Britain" unless you mean England, Scotland, and Wales, but not Northern Ireland.

Africa (Sub Saraha)	Don't use "Africa" (continent) in lieu of more specific African countries.

Geographic identifiers may be major or minor as appropriate.

Use the descriptor Developing Nations (used for "Third World"), in addition to Foreign Countries, when the subject is national or international social and economic development. Developing Nations is a socioeconomic concept and should only be used in that sense, e.g., shouldn't be used for a document on "Teaching Reading in the Sudan," unless the idea is reading for economic development, etc. The descriptor Developed Nations (i.e., industrialized countries), also a socioeconomic construct, may also be indexed along with Foreign Countries when appropriate. Developing Nations, when used, is often a major descriptor (both it and Developed Nations may, of course, be major or minor depending on the document).

5. Use the Identifier field for specific entities that cannot be covered by Thesaurus descriptors. Always index the following types of Identifiers when they're the subjects of documents (using the IAL precedents):

   School names
   (public grade or high schools should not be named unless they're particularly outstanding -- instead, index the school district's name);
   College or university names;
   Institution or association names
   (not indexed if they merely prepare a report, unless it is an official position paper or similar statement);
   Persons;
   Laws
   (enacted, not proposed);
   Geographic Regions;
   Foreign country names
   (coordinated with the minor descriptor Foreign Countries -- ERIC's idiosyncrasies for Canada and the U.K. are noted);
   Test names;
   Computers;
   Computer Programs;
   Specific methods, theories, ideas, etc., not found in Thesaurus, e.g., Day Care Licensing, Stochastic Processes, Thinking Skills, Higher Order Skills, Child Health, Child Health Care, Reunion Behavior, Caregiver Role, Perfectionism, Parental Leave, Dreams;
   New terms in the field, especially those being written about frequently.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
RURAL EDUCATION AND SMALL SCHOOLS

Prepared by

Linda Miller

May 1989

ERIC Clearinghouse on Rural Education and Small Schools
CRESS

INDEXING GUIDELINES (May 1989)

The average system-wide totals of index terms (descriptors and identifiers) per resume are 10 for CIJE and 12 for RIE. Please take a second look at any resume with more than 20 indexing terms.

The total number of major indexing terms (descriptors and identifiers) permitted per resume is 7. The total number of major identifier terms may not exceed 2. These numbers are limits--not goals. Please major only the appropriate descriptors and identifiers within these limits. Every resume must have at least one major descriptor.

GENERAL

(1) Educational Level (Assign first, before other indexing is done.)

An educational level descriptor must be assigned if the document deals with it. Always use the most specific educational level descriptor(s) possible. If necessary, more than one educational level descriptor may be assigned to a document or article, e.g., INTERMEDIATE GRADES and/or JUNIOR HIGH SCHOOLS to describe middle school populations, HIGHER EDUCATION and ELEMENTARY EDUCATION to describe preservice preparation for elementary school teachers. Education level descriptors should only be major if the level itself is the subject, e.g., philosophy of, theory of, history of, important legislation concerning.

(2) U.S. Congressional Hearings

A. Use the minor descriptor HEARINGS and the pubtype 090.
B. Use the appropriate Congressional number as an identifier, e.g.,"Congress 100th."
C. Indicate the hearing number or the committee publication number in the report number field, e.g.: House-Comm-Pub-100-639; Senate-Hrg-100-335.
D. Indicate the serial number in the note field, e.g.: Serial No. 100-436.
E. Include the Public Law if applicable, e.g.:
   - In abstract--"...Indian Self-Determination and Education Assistance Act (Public Law 93-638)...";
   - In identifiers--"Indian Self Determination Education Assistance Act"
     (note: abbreviated for 50 characters--"Public Law 93 638" is a UF in the IAL)
F. Include the House or Senate bill number, if applicable, in the title or abstract, e.g.: "S. 1703," "H.R. 1801."

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800/624-9120 (outside WV) • 800/344-6646 (in WV) • 347-0400 (Charleston area)
AEL is an affirmative action/equal opportunity employer

(3) Questionnaires

Use QUESTIONNAIRES as a minor descriptor and the pubtype 160 for documents that include the actual survey instrument.

(4) Pubtype 143

Use a minor descriptor to describe the type of research, e.g.: CASE STUDIES, FIELD STUDIES, LONGITUDINAL STUDIES, STATE SURVEYS, NATIONAL SURVEYS, SCHOOL SURVEYS, COMPARATIVE ANALYSIS, TREND ANALYSIS, FOLLOWUP STUDIES. If a document or article deals with how to conduct these studies then these descriptors should be major.

(5) Pubtype 050, 051, 052, or 055

Use a minor descriptor to describe the type of guide, e.g.: LESSON PLANS, RESOURCE MATERIALS, INSTRUCTIONAL MATERIALS, TEXTBOOKS, WORKBOOKS, FACULTY HANDBOOKS, LABORATORY MANUALS, STUDY GUIDES, TEST MANUALS.

(6) Foreign countries

Always use FOREIGN COUNTRIES as a minor descriptor for documents or articles about countries (populations included) other than the United States of America, coordinating the name(s) of the specific country/countries (and geographic subdivisions) in the identifier field. Geographic identifiers many be major or minor as appropriate.

(7) Identifiers

Do not be reluctant to use identifiers. Always index the following types of identifiers when they are the subjects of documents:

- Institution or association names
  (do not index them if they merely prepared a report, unless it is an official position paper or similar statement);
- College or university names;
- Languages not appearing in the Thesaurus
  (see instruction 4 of scope-specific guidelines below);
- Tribes
  (see instruction 5 of scope-specific guidelines below);
- Persons;
- Laws
  (enacted, not proposed);

- o Geographic regions;
- o Foreign country names
  (be sure to note ERIC's idiosyncracies for Canada and the U.K.);
- o Test names;
- o Computers/Computer Software;
- o Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g. 4 H Programs, Child Health Care, Double Bind Theory, Farm Crisis, Foxfire, Impact Aid, Outward Bound, Partnerships in Education, Twenty First Century, Wetlands, Winter;
- o New terms in the field, especially those being written about frequently.

SCOPE-SPECIFIC

(1) Chicanos or Chicanas used in the document:

Use Chicanos or Chicanas (or a derivative thereof) as an identifier and a "Mexican-American" descriptor, e.g.:

DESC Mexican Americans; Females
IDEN Chicanas

DESC Mexican American Education
IDEN Chicano Arts; Chicano Studies

(2) Native Americans used in the document:

This term is not synonymous with AMERICAN INDIANS. Use Native Americans, Native American Studies, etc. in the identifier field along with the appropriate specific descriptor(s), e.g. AMERICAN INDIANS, ALASKA NATIVES, ESKIMOS, CANADA NATIVES. There are various derivatives of AMERICAN INDIANS in the Thesaurus, e.g., RESERVATION AMERICAN INDIANS, URBAN AMERICAN INDIANS, AMERICAN INDIAN HISTORY, that may be used with, or in lieu of, the broader descriptor (see rotated display). ESKIMOS has one derivative descriptor, ESKIMO ALEUT LANGUAGES.

(3) Alaska natives or Canada natives used in the document:

Use the descriptor(s) ALASKA NATIVES or CANADA NATIVES, with appropriate other "American Indian" and/or "Eskimo" descriptors for specificity. ALASKA NATIVES and ESKIMOS (or ESKIMO ALEUT LANGUAGES) may be coordinated with the identifier "Aleuts" when appropriate.

(4) American Indian Languages indexing:

Check first to see if the language is a Thesaurus descriptor, i.e., in the AMERICAN INDIAN LANGUAGES hierarchy. Ex.-- APACHE, CHEROKEE.

Then, look under IAL category #13. Ex-- Crow, Karuk

For new "language" identifiers, use the following authority:

Classification and Index of the World's Languages
by C.F. and F.M. Voegelin (Elsevier, 1977).

(5) American Indian Tribes/Reservations indexing:

Use identifiers (IAL category #08 for tribes, #17 for reservations). Ex -- Eskasoni Indian Reserve NS, Hopi (Tribe), Navajo (Nation), Nez Perce (Tribe), Pima Maricopa Reservation AZ, Pine Ridge Indian Reservation SD, Zuni (Pueblo).

Reference Encyclopedia of the American Indian, Volume 1, 4th edition (ED 283 637) is useful in identifying the proper name of tribes and/or reservations.

Federal and State Indian Reservations and Indian Trust Areas (ED 101 904) is also useful in identifying the proper names of reservations.

These guidelines will be updated as needed. Please contact Linda Miller if you have any questions or need further information.

INDEXING PRACTICES

OF THE

ERIC CLEARINGHOUSE

FOR

SCIENCE, MATHEMATICS, AND ENVIRONMENTAL EDUCATION

INDEXING PRACTICES

OF THE

ERIC CLEARINGHOUSE

FOR

SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION

Prepared by

Jane Henson

May 1989

ERIC

CLEARINGHOUSE FOR SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION

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INDEXING PRACTICES FOLLOWED BY THE ERIC ChESS CLEARINGHOUSE

I. GENERAL PRACTICES FOLLOWED IN RIE/CIJE INDEXING

A. SOCIAL STUDIES

"Social Studies" refers to education in history and the social sciences, grades K-12. Social Studies is indexed as a major descriptor when it is the main theme or topic of a document. The term is commonly majored on elementary-level (K-6) curriculum guides, lesson plans, units of study, class activities, and similar materials that integrate subjects like geography, history, and current events together under the "social studies" label. It is more frequently minored on secondary-level materials (grades 7-12), where the individual subjects of social studies are generally presented separately.

B. GEOGRAPHY, HISTORY, ART, MUSIC, ETC.

These and other descriptors representing "subjects" taught or studied in school are majored when they are principal topics of documents. This is more frequently the case for secondary education where such subjects are usually presented in separate courses, than elementary education where they're more often sub-topics of "social studies," "art education," etc.

Care should be taken to always index to the most specific available descriptor. When appropriate, for example:

Use Human Geography, Physical Geography, or World Geography rather than Geography;
Use United States History, European History, Black History, etc., rather than History;
Use Creative Art, Freehand Drawing, Handicrafts, Painting (Visual Arts), Sculpture, etc., rather than Art;
Use Singing, Bands (Music), Jazz, Oriental Music, etc., rather than Music.

C. NUMBERS OF INDEX TERMS / MAJORS AND MINORS

Average systemwide totals of index terms (descriptors and identifiers) are 10 for CIJE and 12 for RIE.

The total number of major index terms permitted is:

6 Descriptors and 1 Identifier
or
5 Descriptors and 2 Identifiers

These numbers are not goals. Accumulations of more than 20 terms per document should be given a second look. Also, only appropriate descriptors/identifiers should be majored within the above limits; however, every document must be assigned one major descriptor.

D. POPULATION TERMS

These terms refer to the groups or individuals studied or discussed in a document. They are normally not majored unless they're the subject or an important aspect of the document. Types of terms that describe population include:

Education level
(must be assigned if the document deals with it; see details under item E, below);
Age;
Ethnic group
(race, religion);
Nationality;
Intelligence or ability level;
Physical/emotional characteristics;
Socioeconomic characteristics;
Sex.

E. EDUCATION (GRADE/ACADEMIC) LEVEL

Education level must be indexed if dealt with in a document. Indexers should get into the habit of assigning education levelers first, before any other indexing is done. They're minored when they describe the level at which something, i.e., the document subject, occurs (the usual case).

EX -- A report on music education for preschoolers.

They're majored only when the levels themselves are the subject.

EX -- Philosophy of, theory of, histor, of, important legislation concerning.

Indexers should always use the most specific educational level possible.

EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

If appropriate, more than one level may be assigned, e.g., Intermediate Grades and/or Junior High Schools to describe middle school populations, Higher Education and Secondary Education to describe college-level professional continuing education programs for secondary school teachers.

Education levelers are often easily extrapolated from a document's content without being specifically mentioned.

EX -- "Grade 8 students" certainly gives the ed level away; Students "from X school district" is an ed level clue.

(See list of education levels in the Indexing Handbook or in the front matter of the Thesaurus.)

II. OTHER PRACTICES

A. IDENTIFIERS

Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus. The following types of identifiers are always indexed (using the IAL precedents) when they're the subjects of documents:

- Institution or association names (not indexed if they merely prepare a report, unless it is an official position paper or similar statement);
- College or university names;
- Persons;
- Laws (enacted, not proposed);
- Geographic Regions;
- Foreign country names (coordinated with the minor descriptor Foreign Countries -- ERIC's idiosyncrasies for Canada and the U.K. are followed);
- Test names;
- Computers;
- Computer Programs;
- Specific methods, theories, ideas, etc., not found in Thesaurus, e.g., Bill of Rights, British Colonies, Cold War, Commemorative Events, Empowerment, Jewish Studies, Koran, Nostalgia, Perestroika, Supply Side Economics, Twenty First Century, Universal Declaration of Human Rights;
- New terms in the field, especially those being written about frequently.

For documents dealing with specific historical time periods or events, special combinations of identifiers may be used.

EX -- United States Constitution and
Bicentennial
(the descriptors Constitutional
History and Constitutional Law may be
used additionally, at the indexer's
discretion);
Northwest Ordinance 1787 and
Bicentennial.

B. FORM DESCRIPTORS

1. When indexing research documents, care is taken to include a descriptor (minor) describing the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies. If a document talks in detail about how to conduct these studies, term(s) are assigned major.

2. When indexing educational practitioner documents or guides, care is taken to include a descriptor (minor) describing the type, e.g., Lesson Plans, State Curriculum Guides, Resource Materials, Units of Study, Instructional Materials, Textbooks, Workbooks, Faculty Handbooks, Laboratory Manuals, Study Guides, Test Manuals.

3. The minor descriptor Questionnaires and the pubtype code 160 are used for documents that include the actual survey instrument.

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE ON TEACHER EDUCATION

Prepared by

Mary Tregillus

May 1989

CLEARINGHOUSE ON TEACHER EDUCATION

ERIC

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ERIC/SP IN-HOUSE GUIDE FOR INDEXING

Major and Minor Terms

Systemwide averages of index terms (descriptors and identifiers) per document/article are 10 for CIJE and 12 for RIE.

Maximum majors permitted are: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.

Every citation must have at least 1 major descriptor, and no more than 2 major identifiers.

Index of the most specific term; never index up to broader terms unless they're equally the subject of documents.

Index the document in hand -- don't make assumptions.

Avoid overindexing and underindexing -- consider the most significant and essential concepts of the document.

Too many minor descriptors are confusing; use the most important ideas.

Accumulations of more than 20 terms per document should be given a look.

Try to assume the searcher's point of view, i.e.,
Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

Identifiers

Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus.

Do not be reluctant to use identifiers, but avoid making up words or using the author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent.

Always index country names other than U.S.(major or minor--subdivided if appropriate), along with Foreign Countries (minor desc), when they're subjects of documents. Note ERIC's use of idiosyncrasies for Canada (use provinces) and the U.K. (use states, i.e., England, Scotland, Wales, and Northern Ireland -- avoid using "Great Britain" unless the topic is the island of Great Britain, (excludes Northern Ireland).

The following additional types of identifiers also should always be indexed when they're the subjects of documents (using the IAL precedents):
Institution or association names (not indexed if they merely prepare a report, unless it is an official position paper or similar statement; avoid indexing public school names unless they're particularly significant--instead, index the name of the school district);
College or university names;
Persons;
Laws (enacted, not proposed);
Geographic regions;
Test names and measurement techniques;
Computers;
Computer programs;
Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Alternative Teacher Certification, Beginning Teacher Induction,

Child Health, Child Health Care, Higher Order Skills, Insulin, Musculoskeletal System, National Teacher Certification, Principal Student Relationship, Premenstrual Syndrome, Reflective Teaching, Socratic Method, Sport History, Teacher Corps, Thinking Skills.

New terms in the field, especially those being written about frequently.

Scope Terms

Preservice Teacher Education or Inservice Teacher Education should be used on all teacher education documents (if at all relevant). The other four narrower teacher education descriptors (Competency Based Teacher Education, English Teacher Education, Student Teaching, and Teacher Educator Education) are added to the indexing, as appropriate. The broad descriptor Teacher Education is used only for broad-ranging discussions or if further specificity is not provided. Teacher education descriptors are majored when they're the principal topic(s) of documents.

Physical Education, Health Education, Physical Fitness, Dance Education, Recreation (or other such term) should be used on all physical education, health, etc. scope-related documents.

Population Terms

These terms refer to the groups or individuals studied or discussed in a document. They are normally not majored unless they're the subject or an important aspect of the document. Types of terms that describe population include:

Educational level (must be assigned if the document deals with it--see discussion, below);
Age level;
Ethnic group (race, religion);
Nationality;
Intelligence or ability level;
Physical/emotional characteristics;
Socioeconomic characteristics;
Sex

Educational Level Descriptors

Must be indexed if dealt with in a document.

Indexers should acquire the habit of assigning education levelers first, before any other indexing is done.

Always use the most specific educational level possible.

EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

Educational Level Descriptors

Minor when they describe the level at which something, i.e., the document subject, occurs (the usual case).
EX -- A report on physical fitness of high school students. Major only when the levels themselves are the subject.
EX -- Philosophy of, theory of, history of, important legislation concerning. Use specific grade descriptors, e.g., Grade 7, Grade 2, in addition to educational level descriptors.

If appropriate, more than one level may be assigned.
EX -- Intermediate Grades and/or Junior High Schools to describe middle school populations;
Higher Education and Elementary Education to describe preparation for elementary school teachers;
Higher Education and Secondary Education to describe college-level professional continuing education programs for secondary school teachers.

The second and third examples above are typical of most teacher education documents, which generally cover both the level of teacher preparation and the level of the students to be taught.

If there is no educational level, try to use an age level.
See lists of educational level descriptors and age level descriptors in Thesaurus front matter or in the Indexing Handbook.

Form Terms

Unless there is an exact overlap with Pubtype codes, care should be taken to include descriptors (minor) that describe the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies.

If a document talks in detail about how to conduct these studies, term(s) are assigned major.

Use Questionnaires (minor desc) and pubtype code 160 for documents that include the actual survey instrument.

See Thesaurus front matter or the Indexing Handbook for "exact overlap" descriptors and Pubtype codes.

Target Audience

Use the audience field only when the document or article explicitly directs itself to an audience, e.g., "...intended for school teachers..." Don't guess who might want to use it.

Even if the article is in a journal published by a research society, teacher association, administrator organization, etc., only use the audience field when an article specifically mentions a particular audience. If not absolutely clear, leave this field blank.

Index Terms versus Terms in the Abstract

Indexed descriptors must actually be in the ERIC Thesaurus.
Indexed identifiers must either be in the IAL or, if new, reflect the precedents established by the IAL. The abstract is reserved for the author's words, i.e., the actual language of a document. Do not purposefully substitute ERIC index terms for an author's terminology in the abstract.

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE ON TESTS, MEASUREMENT, AND EVALUATION

Prepared by

Ruth Christie

May 1989
(preliminary)

ERIC

Educational Resources Information Center
Clearinghouse on Tests, Measurement, and Evaluation

Indexing Guidelines
Clearinghouse on Tests, Measurement, and Evaluation

(PRELIMINARY)

Indexing Basics -- Descriptors and Identifiers

1. Number of Descriptors and Identifiers
   - o Average of 10-12 descriptors and 1-2 identifiers
   - o Maximum of 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers
   - o Minimum of 1 major descriptor per document or journal article
   - o Never major 2 descriptors beginning with the same word (e.g., *Test Validity; Test Reliability)
   - o Provide the same level or extent of indexing for CIJE journal papers as that for RIE documents. Similarly, shorter documents and journal articles usually have fewer descriptors and identifiers than do longer documents and articles

2. Major/Minor Descriptors and Identifiers
   - o Generally major:
     - o Subject Populations (e.g., sample for whom test is relevant)
     - o Significant Terms or Ideas Expressed in Titles
     - o Programs Evaluated (e.g., *State Programs; *Testing Programs)
     - o Research Methodology Discussed or Evaluated (e.g., *Multivariate Analysis)
     - o Types of Tests Evaluated or Developed (e.g., *Multiple Choice Tests)
     - o Test Names
   - o Generally do not major:
     - o Educational Level
     - o Age Level
     - o Document Type
     - o Research Methodology Used by the Document (e.g., Comparative Analysis)
     - o Very broad or general descriptors

3. Population Terms
   - o Subject Populations
   - o Ethnic Groups (e.g., Black Students; Hispanic Americans)
   - o Age Level
   - o Ability Level (e.g., Academically Gifted)
   - o Socioeconomic Characteristics
   - o Sex (only when major focus of document)

4. Educational Levels
   - o Always use educational levels and population descriptors together for research using student populations as subjects (e.g., Elementary Education and Elementary School Students)
   - o Always use educational levels and population descriptors together when document's emphasis is on teachers, school administrators, and/or school faculty members (e.g., Elementary Secondary Education and Principals)
   - o Always use most specific educational level possible, and coordinate with corresponding grade levels

5. Title Terms
   - o When terms in titles are the subject of a document, they are indexed and often majored

6. Tests and Measurements
   - o The focus of a document or article (e.g., the test evaluated, the methodology assessed, the program or policy evaluated, the theory or model discussed, the statistical procedure presented, and the measurement technique addressed) is considered a mandatory major descriptor(s)
   - o Generally, the test type, what it is testing, who it is testing, and how it was used are all ideas that are indexed for research documents studying tests and their development
   - o When an assessment tool is not specifically described or identified by the author as a "test", the most appropriate descriptor is used (Questionnaires; National Surveys; Measures (Individuals); Interest Inventories). However, relevant descriptors pertaining to "tests" are coordinated (e.g., Test Reliability) in an effort to accurately describe the document
   - o Avoid using the descriptor "Educational Testing". A more specific term is used in most every case
   - o The test type (e.g., *Achievement Tests) and the test name (e.g., *California Achievement Tests) are usually indexed as major descriptors and identifiers, respectively
   - o The descriptor "School Districts" is used when the document focuses on specific district policy, data, or personnel
   - o If the name of a school district is provided in the IAL and it is the subject of the document, the IAL identifier for that school district is used. In such instances, the school district identifier is used instead of the "School Districts" descriptor

7. Evaluation
   - o Types of program, school, curriculum, personnel, and statistical evaluations are indexed
   - o The descriptor "Program Evaluation" is used for evaluations of programs/projects of organizations, institutions, and agencies. School-related activities (commonly referred to as "programs") are not usually indexed with this descriptor. An effort is made to use more specific terms to denote the "educational" or "school" context (e.g., Curriculum Evaluation, Educational Assessment)

8. Overindexing
   - o Avoid listing numerous (more than 4 or 5) grade levels, except when the document focuses on several grade levels (e.g., test score trends for a school district for grades 1, 2, 3, 6, and 8)
   - o Avoid listing a string of test names in the identifier field when the subject of a document includes a battery of tests, more than 3 or 4 tests, or tests not listed in the IAL. Tests not listed in the IAL are only used as identifiers when they are the major focus of a document and they appear in the corresponding title field. In most cases, only 1 or 2 tests will be the major focus of a single document

Descriptors

1. Form Descriptors
   - o When indexing research documents, care is taken to include a descriptor (minor) denoting the type of study (e.g., Case Studies, Field Studies, Longitudinal Studies, National Surveys, State Surveys, School Surveys, Comparative Analysis, Trend Analysis). If a document discusses in detail how to conduct these studies, term(s) are assigned major
   - o Pubtype and methodology index terms such as Literature Reviews are assigned minor status
   - o When indexing educational practitioners documents or guides, care is taken to include a descriptor (minor) describing the type (e.g., Resource Materials, Instructional Materials, Textbooks, Workbooks, Test Manuals)

2. Miscellaneous
   - o Always use Foreign Countries as a minor descriptor for documents/journal articles about countries or subject populations other than in the United States, and coordinate with the appropriate names of countries in the identifier field. Geographic identifiers are generally minor terms
   - o Use the descriptor Developing Nations in addition to Foreign Countries when the subject is a national or international program or policy in third world countries
   - o Use the descriptor Developed Nations in addition to Foreign Countries when the subject is a national or international program or policy in non-third world countries
   - o Due to the 50-word limit for CIJE records, test names and other terms emphasized in the original journal paper may appear only in the descriptor, identifier, and/or title fields of CIJE records. Thus, terms not appearing in the CIJE abstract can appear in other fields of the record
   - o Indexed descriptors and identifiers must reflect the language of the Thesaurus and IAL, respectively. However, they must also reflect the actual language of the document or article
   - o The document or article in hand is indexed. In this sense, the indexing does not rely solely on the accompanying abstract
   - o When appropriate, use "Undergraduate Students" when specifically stated in the document. When "undergraduate" is not indicated in the document, use "College Students" or more accurate descriptors (e.g., College Freshmen)

Identifiers

1. Always index the following types of identifiers when they are the major focus of a document and use the IAL precedents:
    - o Institution or Association Names
      (not indexed if they merely prepare a report, unless it is an official position paper or similar statement)
    - o College or University Names
    - o Persons
      (only if they are the subject of a document; do not index persons when merely their theories or research papers are discussed)
    - o Enacted Laws
      (not proposed)
    - o Court Cases
    - o Geographic Regions
    - o Foreign Country Names
    - o Test Names
      (when they are the major focus of the original document and they appear in the IAL; do not list tests that merely were administered to research subjects during the course of the study and that are not the major focus of a document)
    - o Computers
    - o Computer Programs
    - o Theories, models, evaluation methods, statistical analyses, and research methods not found in the Thesaurus
      (Cognitive Process Theory of Writing, Responsive Illuminative Evaluation, Structure Mapping, Test Developers, Writing Achievement, Evaluation Research, Symbol Systems Approach, Test Appropriateness, Measurement of Change, Hierarchical Cluster Analysis, Canonical Redundancy Statistic)
    - o School Districts
      (avoid indexing public school names unless they are particularly significant; instead, index the name of the school district)
    - o New terms in the field, includes tests, statistical methodology, and evaluation methodology

2. Tests, theories, statistical methodology, etc. only briefly mentioned in a document are not indexed

3. After all Thesaurus and the IAL possibilities have been exhausted and no other alternative exists except to create a new identifier, an attempt is made to use (or create) non-IAL descriptors in a standardized manner (e.g., using precedents established by the IAL). However, focus is also on using non-Thesaurus and non-IAL terms as they appear in the document or article

Target Audience

1. Use the audience field only when the document specifically states "...intended for school administrators..." If not absolutely clear, leave this field blank

Pubtype

1. For conference proceedings (021), an attempt is made to index the focus of each of the conference papers provided. As conference papers generally emphasize a specific area (e.g., program evaluation practices in third world countries), ideas are picked from the conference paper titles and usually are indexed as minor terms. The overall topic of a conference is usually indexed as a major term(s)

2. Pubtype 160 is used every time the document or article provides the actual questionnaire, survey, test, inventory, and/or assessment tool or instrument. This rule applies to tools developed primarily for the purpose of the research conducted in the document (e.g., principal surveys)

3. Pubtype 150 is used for papers presented at a conference.

INDEXING PRACTICES OF THE ERIC CLEARINGHOUSE ON URBAN EDUCATION

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ERIC/CUE INDEXING TIPS

re: Major and Minor Terms

1. Systemwide averages of index terms (descriptors and identifiers) per document / article are 10 for CIJE and for RIE.

2. Maximum majors permitted are: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.

3. Every citation must have at least 1 major descriptor, and no more than 2 major identifiers.

4. Index to the most specific term; never index up to broader terms unless they're equally the subjects of documents.

5. Index the document in hand -- don't make assumptions.

6. Avoid overindexing and underindexing -- consider the most significant and essential concepts of the document.

7. Too many minor descriptors are confusing; use the most important ideas. Listing more than 20 terms per document is probably overindexing.

8. Try to assume the searcher's point of view. Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

re: "Urban" Terms

1. Use "Urban Education," "Urban Schools," or "Urban Teaching" as a descriptor for documents about urban educational settings.

2. Use "Urban Areas," "Urban Environment," "Urban Problems," or other "urban" descriptor(s), as appropriate, for documents focusing on other aspects of urban life.

3. If an "urban" context is particularly important or significant, an assigned "urban" descriptor should be a major.

4. If the document contrasts urban and rural education/life, use the descriptor Rural Urban Differences, with other appropriate "urban" and "rural" terms.

5. If the focus is on a particular "urban" public school system, use the school district name as an identifier.

EX -- New York City Board of Education

If the particular "urban" location is focused on more generally (i.e., beyond the school system context), use the location itself as the identifier.

EX -- New York (New York)

Such identifiers are indexed in addition to appropriate "urban" (and/or "rural") descriptors. They are majored when crucial to the content of the document.

(Note: Names of specific public grade or high schools should not be indexed unless they're particularly outstanding; instead, index the school district's name.)

re: Designations of Population

1. Use descriptors to refer to the groups or individuals studied or discussed in a document. These are normally not majored unless they're the subject or an important aspect of the document.

2. Types of terms that describe population include:

Educational level
(must be assigned if the document deals with it -- see discussion, below);
Age level;
Ethnic group
(race, religion, nationality -- see discussion, below);
Intelligence or ability level;
Physical/emotional characteristics;
Socioeconomic characteristics;
Sex.

re: Educational Level Descriptors

1. Must be indexed if dealt with in a document.

2. Indexers should acquire the habit of assigning education levelers first, before any other indexing is done.

3. Always use the most specific educational level possible.

EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

4. Minor the term when it describes the level at which something, i.e., the document subject, occurs (the usual case).

EX -- A report on literacy among high school seniors.

5. Major it only when the level itself is the subject.
EX -- Philosophy of, theory of, history of, important legislation concerning.

6. Use Specific grade descriptors, e.g., Grade 7, Grade 2, in addition to educational level descriptors. However, avoid indexing grade ranges (e.g., Grade 7, Grade 8, and Grade 9) when they're essentially equivalent to a level (i.e., Grades 7, 8, & 9 = Junior High Schools).

7. If appropriate, more than one level may be assigned.
EX -- Intermediate Grades and/or Junior High Schools to describe middle school populations;
Higher Education and Elementary Education to describe preservice preparation for elementary school teachers.

8. If there is no educational level, try to use an age level.

9. See lists of educational level descriptors and age level descriptors in Thesaurus front matter or in the Indexing Handbook.

re: "Ethnicity" Terms

1. Use the most specific descriptor available to identify the ethnic group being studied, discussed, etc. For example, if the document is only about Puerto Ricans, use "Puerto Ricans" not Latin Americans, Ethnic Groups, or Minority Groups. If the document is about Puerto Rican children, use both "Puerto Ricans" and a "child/children" term (e.g., Child Development, Minority Group Children, Elementary School Students [but, not just Children, if at all possible]), since "Puerto Rican Children" does not exist as a descriptor.

2. If many different ethnic groups are covered, list each individually (as descriptors or identifiers - however they appear in the Thesaurus or IAL) if each is discussed separately and different points are made about each. Otherwise, use "Ethnic Groups" or "Minority Groups." These two broad terms should be indexed only as delineated by their Thesaurus scope notes, i.e.:

ETHNIC GROUPS
Subgroups within a larger cultural or social order that are distinguished from the majority and each other by their national, religious, linguistic, cultural, and sometimes racial background (Note: do not confuse with "Minority Groups," which has the connotation of being the object of prejudice or discrimination...)

MINORITY GROUPS
Subgroups within a larger society that are distinguished from the majority and each other by race, national heritage, or sometimes by religious or cultural affiliation (Note: unlike "Ethnic Groups," "Minority Groups" also have the connotation of being objects of prejudice or discrimination)

3. If the ethnic group is an identifier (e.g., Asian Blacks), also index the most specific available descriptor (e.g., Blacks). If such an identifier is majored, the corresponding descriptor should usually be minored. Another example:

> If Chicanos or Chicanas is used in the document, use "Chicanos" or "Chicanas" (or a derivative thereof) as an identifier and a "Mexican-American" descriptor, e.g.:
>
> DESC_Mexican Americans; Females
> IDEN_Chicanas
>
> DESC_Mexican American Education
> IDEN_Chicano Arts; Chicano Studies

4. If a document contrasts two ethnic or racial groups, or two countries, list both. Do not assume that "Whites" or "United States" is implied. Use "White Students," rather that Whites, if appropriate. Use the identifier "United States" sparingly, usually for various subdivisions (see IAL listing) or for overall comparisons with other countries (as above); otherwise, it may be implied by its absence.

5. If both sexes are discussed separately, or compared, the use of "Sex differences," "Sex Role," etc., instead of "Males" and "Females," is usually more appropriate.

6. Use "Foreign Countries" as a minor descriptor for documents/articles about countries (populations included) other than the U.S.A., coordinating the name(s) of the specific country/countries (and geographic subdivisions) in the identifier field. Geographic identifiers may be major or minor as appropriate. ERIC's idiosyncrasies for Canada (use provinces) and the U.K.(use states, i.e., England, Scotland, Wales, and Northern Ireland) should be followed -- avoid using "Great Britain" unless the topic is the island of Great Britain [excludes Northern Ireland].

7. Use the descriptor "Developing Nations" (used for Third World), in addition to "Foreign Countries," when the subject is national or international social and economic development. Developing Nations is a socioeconomic concept and should only be used in that sense, e.g., shouldn't be used for a document on "Teaching Reading in the Sudan," unless the idea is reading for economic development, etc. The descriptor "Developed Nations" (i.e., industrialized countries), also a socioeconomic construct, may also be indexed along with Foreign Countries when appropriate. Developing Nations, when used, is often a major descriptor (both it and Developed Nations may, of course, be major or minor depending on the document).

8. Keep in mind that ERIC users search for descriptors in pairs, or sets, so if a user wants information on Cambodian parents, he or she will search for the combination of "Cambodians" and "Parents." Thus, when deciding which should be major descriptors you should consider probable combinations of descriptors that will be searched. In this example, however, the most specific "parent" term should always be

indexed, not just "Parents." If the choice was "Mothers,"manual access could still be retained under "P" by co-indexing major terms like "Parent Aspiration" or "Parent Child Relationship." Of course, all "parent" terms can be searched simultaneously on a computer via truncation.

9. If a document discusses speakers of a language other than English, use:

-- (desc) Spanish Speaking, (iden) French Speaking, etc.,
OR
-- the specific language itself (desc or iden - however in the Thesaurus or IAL).
OR
-- (desc) Non English Speaking, if unspecified.

In addition, use appropriate "language" descriptor(s), including "bilingual" terms (e.g., "Limited English Speaking").

Of course, (desc) English, (iden) English Speaking, etc., are also indexed when they're the subjects of documents.

re: Form Descriptors

1. When indexing research documents, care is taken to include a descriptor (minor) describing the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies. If a document talks in detail about how to conduct these studies, term(s) are assigned major.

2. When indexing educational practitioner documents or guides, care is taken to include a descriptor (minor) describing the type, e.g., Lesson Plans, State Curriculum Guides, Resource Materials, Units of Study, Instructional Materials, Textbooks, Workbooks, Faculty Handbooks, Laboratory Manuals, Study Guides, Test Manuals.

3. The minor descriptor Questionnaires and the pubtype code 160 are used for documents that include the actual survey instrument.

re: Identifiers

1. Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus.

2. Do not be reluctant to use identifiers, but avoid making up words or using the author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent.

3. Always index the following types of identifiers when they're the subjects of documents (using the IAL precedents):

Institution or association names
(not indexed if they merely prepare a report, unless it is an official position paper or similar statement; avoid indexing public school names unless they're particularly significant--instead, index the name of the school district);

College or university names;

Persons;

Laws
(enacted, not proposed);

Geographic Regions;

Foreign country names
(coordinated with the minor descriptor Foreign Countries--ERIC's idiosyncrasies for Canada and the U.K. are followed);

Test names;

Computers;

Computer Programs;

Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Access to Health Care, Bush Administration, Charisma, Child Health, Cocaine, Collaboratives, Empowerment, Enlightenment Thought, Food Stamp Program, Higher Order Skills, Immigration Law, Partnerships in Education, Policy Implications, Project Head Start, Thinking Skills, West Indians;

New terms in the field, especially those being written about frequently.